HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Corporation for National and Community Service

Chris Talbot:

Hello and welcome to today's HHS ASPE webinar series, Developing and Using a Learning Agenda Approach to Evidence- Building. Our features presenter today will be Mary Hyde from the Corporation for National and Community Service. We'll be getting started in just another moment, so thank you very much for joining early today.

Jessica McNab:

All right, good afternoon everyone. Welcome and thank you for attending today's Health and Human Services Office of the Super Secretary for Planning and Evaluation or HHS ASPE Webinar, show casing different federal agencies and their approach for developing and using a learning agenda for evidence-building.

My name is Jessica McNab and I'm a task lead for Mathematica, helping support this project. I will facilitate today's webinar with the help of our government task lead, Amanda Cash. I'm also joined by my colleague at Mathematica who you have heard speak if you joined us early. His name is Chris Talbot.

Today, as Chris has mentioned, and you can see on our opening slide, we're very excited that Dr. Mary Hyde from the Corporation of National and Community Service, or CNCS has joined us to share their evaluation and learning agenda approach. If you've joined us for our previous webinars, you will know that this is the third webinar that we've offer. This is a seven-part webinar series, although each event does not necessarily build on each other, yet it showcases a different approach from each agency in terms of how they approach their learning agendas.

Please note we did reschedule yesterday's webinar. A few of you reached out to us to inquire when we might reschedule that webinar, and we're working closely with the DOD, Tammy Tippie from the DOD, to reschedule the webinar for later in August. We've also scheduled one of our last events for late August, for August 28th, and we'll share that information at the tail end of our event this afternoon.

Let's get started with a couple of housekeeping details. Many of you have probably used WebEx before or if you've joined our webinars before, I envision you might multitask while I go through some webinar logistic. If webinars are new to you, or WebEx is new to you, I'll talk to you about a couple of key talking points.

So, first, if you called into today's session, please make sure to mute your phone. Of course, that helps with any background noises and won't impact others on the call. So, please place your phone on mute unless you're speaking, and we'll talk through how we'll approach the Q&A sessions shortly.

On the right side of your screen, you'll see different audience consoles of multiple different features. If you have questions during the webinar, we'd love if you would raise your hand. If you click on your hand icon, that will notify us that you have a comment or question, and during the Q&A session, we'll make sure to call on you. If we do call on you, of course, you'll need to unmute your line at that time.

We'll also absolutely welcome you to chat your questions into the Q&A pod. Please see the Q&A pod and if it's minimized with a little caret, in that case you can provide any comments to us or ask any questions, if they come up, as Mary goes through her particular presentation.

And if you look at this for real-time closed captions, you'll find a multimedia viewer pod that you're able to click on. There also may be a minimize or a maximize caret mark there for you, and I believe that Chris has just pushed the information out into the chat for everyone to see. Again, if you need to use closed captioning, please feel free to use that event ID number. The number is 407857.

Moving on, this is our agenda for this afternoon. Again, if you've joined us before, pretty similar to our previous events. I'll welcome our speakers this afternoon. I'll hand off to our government task lead, that's Amanda Cash, to really talk about the impetus for this project, the webinar series. The other activity that Mathematica is doing, and the reason we've invited Mary to join us this afternoon. I'll ask you a couple of polling questions, as we have before, and then what you're here to see and hear, we'll have Mary walk through CNCS's approach for learning agenda. So, we'll spend a good deal of time hearing from Mary and certainly save time for Q&A at the end, as well as a few additional details.

So, as I mentioned, I'm Jessica. I'm a task lead at Mathematica, and also a researcher for the organization on different kinds of curriculum development, facilitate shared learning for different technical assistance projects for Mathematica, most of which are based on quality improvement or delivery system reform. In previous roles, I've worked on the sharp end as an improvement specialist in managed care hospital facility systems, and I've also directed other types of technical assistance projects for rapid cycle improvement in hospitals for American Hospital Association.

I'm joined by our government task lead, Dr. Amanda Cash. Dr. Cash is the acting director for the Division of Data Policy for ASPE. Dr. Cash's portfolio includes research on evaluation methodologies that are appropriate for complex federal programs. She co-leads the Federal Task Force for Combatting Antibiotic-Resistant Bacteria, and her office is also coordinating and leading the implementation of Title 1 of the Evidence Act, so she focuses on implementing evidence building and evaluation plans, which is really why we're here today. Dr. Cash is an epidemiologist by training but primarily focuses her work on evaluation evidence and antimicrobial resistance.

And, as mentioned, Dr. Mary Hyde has joined us this afternoon, which we're very excited about. Dr. Hyde is the director in the Office of Research and Evaluation for CNCS. She's responsible for overseeing the agency's evaluation activities, learning agenda, and capacity assessment, as well as collaborating with shaping and contributing to other evidence-based functions within the agency. So, Dr. Hyde, we're very glad that you've joined us this afternoon.

So, with that, Amanda, I'm going to ask you to talk us through the objectives for today's session, as well as the upcoming sessions.

Amanda Cash:

Sure. Thanks, Jessica. So, I just want to briefly say that the Office of the Assistant Secretary for Planning and Evaluation within HHS is known colloquially as the policy think tank or the policy advisor to the secretary for the department. We do a lot of coordinating and implementing of crosscutting initiative, of which the Evidence Act is one. And we're conducting these webinars so federal staff at HHS, and beyond, can learn more about evidence-building plans or learning agendas. But, well, and we also welcome your questions and participation throughout the series.

I'd also just like to note that Mary Hyde is a dear friend and colleague, and we're very excited to hear from her today. She is an early adopter of the learning agenda approach and provides a really great perspective, so we're excited to have her here today.

And just, you know, very briefly, the objectives of the webinar series are to have speakers discuss their organization's stage of implementation of evidence-building approaches, their processes that they developed to build these evidence approaches and plans, how they were implemented, barriers faced when developing and implementing, and then also the impact of these plans and any sort of organizational decision-making or program effectiveness or any lessons learned.

Last year -- sorry, not last year. NIH shared their approach on July 18, and USDA's Foreign Agricultural Service shared their approach last week, and, again, we'll notify you when we can access those presentations and recordings, as well as the report that Mathematica is putting together, based on this series. So, thank you again for your participation, and I'll turn it back over to you, Jessica.

Jessica McNab:

Thanks, Amanda. Okay, great. And so, as Amanda mentioned, this is our third webinar. We had a great discussion with NIH and USDA, and we will be loading the information into a website, and Amanda will share that internally as well. We've heard from many of you, so we will share that with you shortly.

So, before we jump in with Mary, and, again, if you joined us before, you should now be familiar with our baseline polls, just to get a sense of what you're learning interests are, as well as your speech of implementation. So, our first poll is really going to be about what you're most interested in learning about for today's webinar. So, are you most interested in which agencies have fully implemented learning agendas? Are you more interested about how agencies have structured their approach, their processes, how they're really implementing learning strategies? Third, are you more interested to hear about the barriers that agencies have experienced and perhaps some of the strategies to overcome those barriers? Fourth, how and what agencies have learned, what are their lessons learned when implementing the learning agendas; or fifth, other? Feel free to chat in a response if we haven't hit on what you're most interested in. So, we'll leave this poll open for a minute, and you can select one of those answers to choose, and once we close the poll, we'll share the results with you for this. I'll pause there and let you all select your response, A, B, C, D, or E.

Chris, do we have folks responding to the poll?

Chris Talbot:

Yes. Yes, we do have. So far, we've got about half of our audience that have been able to respond so far, with the majority of them having an interest in how the agencies are structured, their approach and processes to implement learning strategies. We also have a fair amount of interest, as well, about the barriers that have been experienced and strategies to overcome them, as well as how and what agencies have learned when implementing their learning agendas.

Jessica McNab:

Okay. Great. Great. Well, why don't we push the second poll here, which is to get a sense, again, of what stage agencies are in, in terms of implementing a learning agenda. So, again, this was a seven-part series, but the series does not necessarily build. It's not linear. It showcases different agencies, so we made the assumption you made plans for all, you may do it for some, you may only join us for one of these events. So, we're trying to assess agencies and your state of implementation, in addition to speakers, which, of course, we're excited to hear from Dr. Hyde this afternoon.

But at what stage is your agency at in implementing a learning agenda? Are you fully implemented and operational; B, fully implemented, not operational, just fully implemented; C, in the process of implementing; D, planning to implement; or, E, have we have not hit on what stage you're at? Is there others? Feel free to chat in your responses. Again, I'll give that a few minutes while you select your response.

Chris Talbot:

All right, Jess, it looks like about half of the respondents' responses that are coming in are talking that they're planning to implement. Some have not started yet, but they are definitely in the process of starting.

Jessica McNab:

Okay. Thanks, Chris. And I think we've now had three events and this is our third poll, I think we're hearing similar things on these events, and, of course, we're going to cross-reference who has attended what events, what your responses are. I know we have many folks who have join us from the same entity. Of course, there are many different departments and offices, and some of you may have different, you know, cascading learning agendas; right? So that's interesting to hear, and I think and hope that gives Mary some context for her presentation in terms of individuals that are in the planning or in the process of implementing. Thanks, Chris.

Okay. So, the reason why we're here today is to hear from Dr. Mary Hyde. Again, Dr. Mary Hyde is the Director of the Office of Research and Evaluation for CNCS. Dr. Hyde, I'm going to hand it off to you. The floor is yours.

Mary Hyde:

Thank you, Jess, and thank you, Amanda, for that nice introduction. And thank you to folks who have taken an hour out of their day to listen to our experience here at CNCS and hopefully maybe take a tidbit away that will help you in your own journeys. So, if you could switch to the next slide, please.

Great. Thank you. I am with the Corporation for National and Community Service, as Jess and Amanda have both mentioned. If you're not familiar with our agency, it is a small agency. We tend to hover around maybe 500 staff people on any given day. We are primarily a grant-making agency. You can see at the top of the slide here that our mission is to improve lives, strengthen communities, and foster civic engagement through service and volunteering. So, what does that mean? Most of our grants are national service grants. We are organized into two main funding streams in the sense that we have a funding stream for AmeriCorps programs and a funding stream for our Senior Corps programs.

Within those two primary programmatic areas, we have six models, and I share this with you because this is important for thinking about a learning agenda, thinking about how to build evidence. Just as with your own agencies, all of this is context specific, so for this presentation, it will be helpful for you to wrap your heads around the fact that we're really talking about developing not only a learning agenda for the agency but also for six very specific types of program models. So, we have our AmeriCorps State/National. We have AmeriCorps VISTA. We have AmeriCorps NCCC, which stands for the National Civilian Community Corps.

Within our Senior Corps programs, we have the foster grandparents, we have the Senior Companions Program, and we have RSVP. This has relevance for specific questions. This has specific relevance for the types of designs one would build for building evidence. They have very different information needs. There are some similarities across these programs, but they also have their own unique information needs for management and budget decisions, and it also, quite frankly, means working relationships with different casts of characters, if you will.

So, while we have the leadership of CNCS, we also have very specific programmatic leadership and colleagues, and that means different types of places, in terms of where they are with their evidence building, in terms of their adoption of this type of approach to learning and to building evidence for their programs, so that has very specific implications, not only for our day-to-day but how one crafts a learning agenda. Next slide, please.

We were established in 1993 as the Corporation for National and Community Service. As I mentioned we're a small federal agency. Our budget is a little over $1 billion. Again, for contextual purposes, because where we are situated and where you are each situated within your own agencies has implications for the learning agenda for the evidence-building process for the specific types of research and evaluation designs that you'll be building through your learning agenda. For us, this is a very high-level overview. But, basically, we are our head of our agency, our political appointee is called our chief executive officer.

We have three primary areas of leadership, and then staff and programs and offices that fall within those streams. We have our chief program office, which is essentially where our AmeriCorps and Senior Corps programs sit. We have our Chief Operations Office, which has offices like budget and things like that, more of the operational sort of backbone structural types of offices that support the programs, and then there's the chief of staff. And our office reports to the chief of staff. The other offices within this chief of staff CEO line are things like the risk officer, external relations, human capital and general counsel.

Again, this is relevant, because, you know, my position, where my office reports to has implications for the process and the approach that we take, and sort of our context in which we're operating. In some ways, you might say that, you know, where we sit makes sense because it keeps us somewhat independent of the offices for whom we are evaluating and assessing and generating information around activities and outcomes. They're the primary focus of our evidence-building efforts, so it's important that we have some independence. That said, we report to the top political leadership of the agency, so there are pros and cons to that as well. So, again, all has implications for learning agenda. Next slide, please.

So, what is our approach? In some ways, you know, this conversation is interesting to me, because, you know, it's almost as if we just started the conversation around learning agendas and how we use those for evaluation planning and for evidence-building activities. And in many ways, we are in a unique point in time for building a learning agenda, but I think it's important to understand that, at least for this agency, as long as I've been here in this office, this is a continuation of a conversation that's been ongoing, and it's been ongoing across administrations. It's been ongoing across different leaderships, both with our programs and our operational offices and our agency, so the current version of the learning agendas that I think we are all very much talking about and thinking about are really a continuation and a building upon a foundation that, in my case, has been in place for, you know, well over six-seven years now.

I view the learning agenda just as I have viewed logic models. So, before I came to the federal government, before I had this position, I was doing evaluation capacity building in state and local communities, and, for me, I think of the learning agenda almost in the same way as I think of a logic model. It's a management tool. It's a useful tool, and it could be a catalyst for conversations. It could be a catalyst for relationship building. It's sort of a common document, a common process that you can sort of all come around. If you're coming from an evaluation perspective or programmatic perspective, it helps you build a common language, a shared understanding. It can help you set priorities. It can help you identify what resources you have to bring to bear to this learning agenda, what gaps there may be.

In general, in my experience, just as with logic models and developing theories of change, developing the graphic that represents those theory of change with different organizations, you're doing the same thing with the learning agenda. You're saying, okay, this is sort of what we're all agreeing to do. This is, you know, the path that we're charting. This is what we're going to refer back to if we realize that we need to shift course a bit. It helps us all service some assumptions. It helps programs identify, you know, what their most critical information needs are within their programs and across programs. It helps you set goals. It helps you set a pathway and a strategy for achieving those goals around evidence and programmatic goals, and it really, you know, helps you sort of hone in on what your most critical information needs are.

Just like I think in my experience, a logic model or a theory of change exercise, using the learning agenda, building a learning agenda with your colleagues inside of the federal agency, over time, that helps create a culture of learning. And, you know, if you sort distill that down, what is culture? It's just a word for saying how we do things. If you think about different groups and different cultures, it's a shared language. It's shared ideas about what this evidence thing is, what is evaluation, what is learning. It is establishing shared values and beliefs or ways of knowing about what we do together as an agency.

If we're all trying to achieve the mission of our home agencies, you know, how you go about it and how I go about it, helping us all understand those ways of going about that and learning to treat each other as trusted sources of knowledge and expertise, that's what I mean by creating a culture of learning, and I think this process of building an agenda, implementing it, and using it to have continuous improvement and ongoing conversations is the way in which that we've tried to approach this as CNCS. It helps people think about, who are not necessarily researchers and evaluators, think about the role of evidence in a learning organization, because as I'm sure is the case in your home organizations and agencies, people think of themselves as perhaps being in a learning organization. But what that means for them may not translate necessarily into a learning agenda that, you know, captures how we use evaluation for various purposes.

I also find that, you know, in terms of building that culture, building those norms, you know, it helps us all think about ways in which we can introduce evidence as, you know, a source of change behavior, how we make funding decisions, how we make strategic decisions, the types of assistance that we offer our grantees, the types of priorities that we establish.

So, it's through this process, through these meetings and these conversations with, again, the learning agenda as simply a tool and a management tool is that that's how we sort of approached it. So, if someone else were to be the director of this office with a different background, perhaps they might take a different strategy, but my background is in evaluation, and I've been doing evaluations for over 20 years, and so, in my mind, this has been a relatively easy transition from thinking about, you know, using the logic model as a tool to using the learning agenda as a tool. Next slide, please.

So, I started to talk a little bit about, you know, how we've been using the learning agenda for evaluation planning. I wanted to talk a little bit more about processes and structures. I can get into more details in the Q&A if people want to drill down into some of the nuts and bolts like, you know, what is the organization of your learning agenda, what does the document look, like, you know, what is the organization of your learning agenda, what does the document look like.

But I wanted to focus a little bit more at sort of the processes and structure, and I wanted to sort of talk through how we, as an office, have shifted in terms of our processes and structure, and then the ways in which our office in and the agency have interacted more broadly. So, I think that with the Evidence Act and with the Title 1 sort guidelines and expectations in the legislation, it has created an opportunity to formalize for, at least us, what has been a rather informal process here, and even predating -- I'm been here about seven years.

These conversations have always been taking place. There's been an Office of Research and Evaluation. We may have called it a research agenda. We may have called it a strategic plan for, you know, evaluation. Now we're calling it a learning agenda or an evidence plan. But, in essence, you know, what this moment in time has created is an opportunity for us to be a bit more formal about this. So, just to walk through our office in the time that I've been here, we have, you know, sort of gone from a hide-and-seek -- I put it here in the slide, you know, sort of tongue and cheek -- you know, chasing people down, sort of requesting meetings with them at the beginning of the fiscal year, you know, trying to talk through what types of evaluations they might want conducted in the coming year to what is now a much more formal process.

Because of this evidence Act, you know, we need to sort of make this something that is a little bit more formal internally that has literally the sign-off of our high leadership, ultimately, with the goal of making it public, because this is sort where the norms and expectations have gone within the federal government. Other agencies have done this a little bit earlier, so they're a little ahead of the curve. But for us, it's been mostly an informal process, so we've really, you know, to just sort of been a bit stark about it. You know, seven years ago we were chasing people down and requesting meetings up until this year, where, you know, the CEO has requested a briefing on the status of this and what it's looking like, and she wants to weigh in on it. So, for us, that's much more formal process.

What has also happened as this has become more formalized, it has created some confusion, but also an opportunity to sort of integrate different planning processes within the agency. So, I mentioned, for us, inside of the office, you know, we were kind of creating our learning agendas and our research agendas aligned with our strategic planning and aligned with budget planning, but it wasn't a formal part of that process. Well, starting last year and moving into this year, you know, we are being incorporated much more intentionally, these conversations around evidence and what needs to happen with evidence building and what are the staffing resources, what are the appropriated dollars, you know, these conversations have become much more formally integrated into these various processes. That, however, has created a little bit of confusion.

So, you know, we've had several meetings over the course of this fiscal year to talk about this learning agenda, to talk about our priorities for evidence building, and oftentimes people are like, wait, are we in a budget meeting, are we in a strategic planning meeting, or is it the evidence meeting. So, it has created some opportunities and some challenges inside the agency in terms of thinking about where this fits into all of the various processes and structures that are already in place.

I would say that it also has, in some ways, caused us inside the Office of Research and Evaluation, and across the agency, to really become a little bit more reflective and intentional about our learning processes, if you will. I use the stop, drop, and reflect. You know, I don't know about your agencies, but we often act like we're running around putting out fires every day and every week, and so this idea of stop, drop, and roll came to mind because of that old fire drill.

Well, this process has really created an opportunity for us to stop, drop, and reflect, and I would say the Office of Research and Evaluation started this process probably two years ago, where we very intentionally, at the end of every fiscal year, draft learning memos for our internal use so that we are documenting and tracking what these projects taught us and what that means in terms of informing our next series of research projects and trying to engage our programmatic colleagues and our operational offices in very intentional conversations. We did this evaluation of your program. Here are findings. This is what we think this means. What does it mean to you? Now what do we do? So, asking these questions, creating conversations and structures where we meet intentionally about this is relatively new for us, inside of my office and across the agencies. So, we have standard times in the year now that we actually have to draft these memos. I ask my team to do this so that we can create a short memo for our CEO, so that we're taking pause and inventory of what we're learning along the way through this learning agenda.

And I think, again, this has been somewhat happening informally, for as long as I've been here anyway. But this guidance and this expectation and requirement that we submit these learning agendas and, you know, everything that's inside the Evidence Act for Title 1, as well as Title 2, has really created the need to make what has been somewhat informal conversations much more formal. And I would say that it is a good opportunity to think of these other processes, but it also creates some confusion. Next slide, please.

So, this question threw me, actually. And I hear folks, you know, wanting to hear or saying that they're somewhat in the planning stage. And I think you've been hearing me say, you know, this has been an ongoing conversation. There may have been different words that are used or different terms. Certainly, we didn't have the Evidence Act. It's sort of, you know, off a rising mandate from congress to do this work. But, certainly, this administration isn't the first administration to talk about the use of evidence for management and budget purposes.

So, you know, when asked to sort of prepare for this conversation, having to pick where I am in the stage of implementation and where our agency is, I picked in process, because I frankly don't know what fully implemented and operational will mean, or will ever mean. I see this as an ongoing iterative process. If you want to sort of start the clock at, okay, the evidence was passed. The evidence Act was passed. You guy haves to come up with a plan. You got to send it over to OMB or whatever we're being asked to do. Okay, then I would say we're definitely in process, because we've been working on this latest version of our learning agenda most of this fiscal year, quite frankly.

Our goal is to have this cleared internally and finalized by the end of this fiscal year, because we are trying to use it for budget planning for the out years. We have had probably a dozen meetings inside the agency since January. I, in fact, right now, today, have been working on the latest version based on the last two meetings with the CEO, with the goal of getting that over to for some final priority setting. So, we are very much in the process.

I'm not quite sure even what fully implemented will mean. I guess it will mean a document that is signed and posted on our website, and hopefully we will continue using it to build evidence in the next fiscal year, much as we've been doing this fiscal year, and in prior fiscal years. So, for me, the beginning and end points are a little blurry. But if you start when the Evidence Act was passed to now, this is where I'd say where we are. Next slide, please.

Okay, barriers and strategies: I would say, in my experience within this agency, the barriers have been, you know, jargon. The barriers have been, quite frankly, fear and a reluctance to want to be assessed and evaluated. You know, we're all here to advance the mission of the agency. Our colleagues believe they're doing that to the best of our ability. What if we learn that what we're doing isn't working as well as we thought it was or at all? You know, there's real fear that people, I think, experience when you start talking about, you know, these very sort of systematic ways of going about looking at whether or not people are achieving the change they had hoped to achieve.

And I think one of the barriers, frankly, you know, for our office, and for perhaps your offices as well, if you sit inside of a policy evaluation and planning offices, people sort of view this as a nice thing to have; right? We get our appropriated dollars, everyone's trying to get the dollars out the door to the communities to deliver services, to achieve the mission. Evaluation is nice. Research is nice. And if we have time and money, that's a nice thing to do. Well, I think with the passage of this Act, and even regardless of that Act, if, you know, folks take to heart the notion of providing the most effective thing possible to people in communities with public dollars, you kind of have to shift to demonstrating that it's not just nice to have, but it's something that you can't afford not to have. And so, you know, what that looks like for any particular agency or program is different.

I would even venture to say you can't necessarily even plan for it intentionally. I think part of our role in this work of learning agendas is being attuned to our environments and to opportunities that present themselves to have some easy wins, or some relatively quick wins, to demonstrate that having some information, you know, some evidence that's just in time for a decision or at a critical point that's going to sort of change someone's mind about the utility of this is really critical to overcoming this barrier, and it's almost done one by one; right? Whatever your counterpoint is, your leader your colleagues, at some point, they have to experience themselves for their own priorities and their own fires and their own needs that having evidence on hand can actually be helpful to them and to help them get to where they need to go.

I also think that, you know, to overcome fear, you really do need a leadership agency-wide, you know, whatever your structure is programmatic-wide, that it's okay with learning that something may not be going along the way you thought, and the whole idea behind getting good information about it is to improve. So, really making failure not the word but an opportunity for improvement. And I think that's also sort of an experience-by-experience type of activity, and it is also a leader-by-leader type of mindset. And I think the best we can do is model it and to demonstrate that, you know, this is not something that is going to necessarily think anybody's activity, if it's built in as a continuous sort of activity into everyday work.

And then, lastly, I would say to overcome the barrier of jargon, it's incumbent, I think, upon us who, you know, are perhaps the ones responsible for designing and executing on research and evaluation designs that when we are working with folks to understand their questions and their information needs on the front end, and when we're working with our colleagues on the back end of taking findings and interpreting them and ensuring that they're relevant for the decisions that they have to make, or the goals that they have, that we are speaking in words that make sense to everyone. So, in essence, you know, we're brokers, and it's incumbent upon us to understand they're doing and their language and then making sure that our words map up to what they're trying to do. Next slide, please.

So, what's the expected impact for us? Well, I will go back to my theme. You know, we're making progress, and I think because we're building on a foundation of these types of activities that have been underway for a number of years, I think that we'll continue to make incremental progress in coming to agreement, at least with this cast of characters at this point in time on what our priorities are and what we want to learn. It will be nice, you know, to have a document to point to. It will make it feel a little bit more tangible, and at least it's something that we can reference as, you know, we continue down the path.

I do think that it will continue to shift conversations inside of the agency, not only inside the Office of Research and Evaluation but across the programs and out into the field that, you know, we already see evidence of that, and I think it will only continue to do that. It will make people start to ask for information. It will sort of challenge people's assumptions about, oh, well, we thought this was what it would accomplish, but maybe not, or we thought this was what we're doing, but it turns out we're not doing it this way, and it will help set priorities. I think, you know, I don't know that our agency is particularly unique in this, but I think it's very hard for people collectively to agree on what the top priorities are and to keep revisiting that conversation and doing it in a way that aligns with the timeline of decent evidence, and that evidence, because it's on a continuum, of course.

I mean, there's decent data that is a little bit more real time. But then there's the longer-term studies that are required to answer some of the bigger policy and programmatic questions. But, you know, having those conversations around, you know, what we're all trying to learn about our work and assess to the extent with which we're achieving our mission allows us to at least have that conversation and keep those questions top of mind.

I think that, also, the expected impact, and, again, we have some examples of this occurring already, are that, you know, my hope, anyway, is that our learning agendas will reflect the ways in which research and evaluation can play a role in innovative programs, developing innovative strategies, practices, solutions. It can play a role in improving, as you're implementing and moving along, and it can play a role in demonstrating the impact, or the lack of impact in some cases. And I think, to me, that's ultimately the goal, so that anyone inside of the agency can think of data and evidence as something that they think of in the same breath as what about this strategy; well, what if we put together this component for this type of funding stream or this type of initiative or this type of program? I hope that, you know, this process will encourage everyone to think about, okay, well what's the data there? What data do with need at this stage, what data do we need at that stage? And that, over time, this creates a robust body of evidence for what is working and what isn't working so that we can make our mid-course corrections.

And I would say that we have a number of examples inside of our agency over the past several years that demonstrate that this has, indeed, happened, and I think that there's no reason to expect that it won't continue to happen moving forward as we all, you know, continue to think about our priorities around evidence building. Next slide, please.

Lessons learned: Okay, so I think, for me, the biggest lesson can be summarized as, you know, evidence building is relationship building, yes. Creating a learning agenda requires some professional technical expertise. You need that in the room. But, at the end of the day, it really is about building relationships with people. So, you know, again, sort of tongue and cheek, I would say, you know, if you're in this business, if you're in this process of trying to build a learning agenda, it's probably a good idea to brush off your cross-cultural competencies, you know. And by that, I mean, you know, stay curious. You need to have a healthy tolerance for ambiguity and for a step forward and two steps back. You have to be a good active listener. You have to have some self-awareness, some humility.

I mean, you really are, in many cases, bringing a set of language, values, norms, and behaviors to the table that not everyone will necessarily share, and vice versa. So, I do think it's important, these interpersonal skills, the sort of disposition and awareness that, you know, what you're asking people to think about and talk about with you may not be second nature to them, and may be somewhat foreign territory. And you're trying to perhaps build evidence for may be poor territory to you, so respecting that and understanding that is as much responsibility on our end to understand their world as vice versa.

Again, counseling may be required. I say that somewhat jokingly. But, you know, in my mind, I often think of this conversation and this process of building a learning agenda -- I'm a psychologist, so my background is psychology -- it's just like counseling. You know, someone either needs to want to be in counseling and make that change or they don't. And at the end of the day, there is no way to force someone into that, so people have to be ready, and you have to have be ready to be there when they're ready. So, I think that's an important lesson learned for us here at CNCS.

And then I will sort of close with, you know, one of my team members shared this blog recently. I don't know about your agencies, but we're undergoing a whole lot of change right now, and so we're often talking about change management and skills that we need to, you know, be resilient and able to live in a very highly-changing environment. And so I will let you and encourage you to read this blog. But the bottom line is, this person says, you know, "No one cares about how much you know until they know how much you care." And I would say that, in essence, sums up, you know, what we've learned here about trying to advance a learning agenda. And that's what I have.

Jessica McNab:

Information and so many little nuggets and quotes that I wrote down from you, so I appreciate that. I also appreciate some of your comments about, you know, how are we defining or categorizing? What kind of operational definitions are agencies making in terms of learning agendas, but also, how are we defining the stages that you're in, and what does it mean to safely implement and implement operational, and I, of course, really did appreciate your jokes here about counseling. That was appreciated.

So, at this point, we would love to open the lines for questions for Mary. I know I have about 60 folks with us, give or take. Some folks, I'm sure, have joined from conference rooms and such. We had a couple of individuals chat in during our polling and ask some questions about content for today, et cetera. But I would definitely encourage you to raise your hand or chat in a question for Mary, or about this work overall, even perhaps something that you heard in one of the previous presentations.

So, just a reminder of how to do that, if you want to raise your hand to ask questions verbally, feel free to click on your hand icon and we'll call on you to ask a question. You will then need to unmute your line. Otherwise, you can click on the Q&A pod, and you can type in a question there, and we'll read that for Mary or for Amanda or for others to address.

So, while we wait for some questions, and I think I'm going to check with your, Chris. I see no questions. Did any questions come to you individually, otherwise I'm going to start in with a couple questions that we were working through as we were working with you, Mary, to build your content for this afternoon.

Mary Hyde:

Sure.

Jessica McNab:

So, just while we wait for some questions to come in, a couple of questions, when NIH presented, and also USDA, they used different terminology, but it seems like kind of going back to their approach or their processes or this structure, one of the first steps that they took was to make an operational definition, define what they meant by learning agenda. And you talk a little bit about that, whether it's the jargon or ensuring that folks use the same nomenclature. So, it sounds like that was a similar step for CNCS as well, is making sure that you understand what different language people are using and come to some commonality and common nomenclature. Did you also define, as an agency, what learning agenda meant and how you would approach that?

Mary Hyde:

We were using the term "learning agenda" for a long time, and it just wasn't resonating. I mean, people did not understand what that was. People didn't get it. And even as recently as this sort of round of talking about it, where we landed, the term "strategic evidence plan" was what stuck. We tried research agenda. We tried learning agenda. We tried evidence plan. It was just called a strategic evidence plan, and let's go with that, so that's what we started calling it. In the draft document that we have, we actually define it a little bit in terms of defining the purpose of it. So, yeah, we wrestled with that language. And, you know, we were circulating documents called "learning memos." People didn't get it. They didn't know what the heck we were talk about.

Jessica McNab:

Yeah. Okay. Thank you.

Mary Hyde:

Yeah.

Jessica McNab:

We have a question in the chat from Clint. Clint, thank you for your question -- comment and question. Real evaluators are focused on impact evaluation, but many grantees are interested in building steps to learn from their own experiences using a variety of analytical methods. Can you talk about CNCS' needs versus grantee needs?

Mary Hyde:

Yeah. That's a great question, and I probably have three different answers for that. So, I would say it's part of our own evolution in terms of engaging in this evidence-building work inside the agency. When I first showed up, this was all about grantees. You know, what are the grantees doing for building the evidence about their impact of their programs? What are their evaluation requirements, sending us their evaluations? I mean, this was all grantee focused.

And I will say it's only been in the last year, and, honestly, catalyzed in many ways by this Evidence Act, has the conversation been about us. Now, we have tried to push that conversation inside of the office to our colleagues. But's been so grantee focused and going through all sorts of effort to help grantees understand what an impact evaluation is and the requirements and the TA, and organizing a lot of resources around that.

I think that one of the nice opportunities, quite frankly, and maybe a risk of the Evidence Act, the combination of Title 1 and Title 2 really broadens the definition of evidence. And I know that definition has been somewhat broad, at least as we have defined it a while now, but it really does open the door to start talking about our data as an agency around our grants, not, you know, their performance but our funding decision. What does our portfolio look like in terms of the types of organizations that we're funding? You know, is there a maturity model for the risk we're willing to encumber in these funding decisions? What about our staffing, are there analytics and studies that we should be looking at that talks about do we have the right staffing structure given the changing evolution and nature of our work? These are questions, quite frankly, that weren't coming up until this round of talking about our evidence priorities.

So, talking about organizational effectiveness as an agency and not pushing that all the way down to the grantees for us is a relatively recent shift in the conversation. And I think it also speaks to our reluctance to want to identify indicators and metrics that we hold ourselves accountable for and that we are far more comfortable putting that on our grantees without necessarily holding ourselves to the same standard. You know, I don't know where we'll go with it and how far we'll get, but I would say that we have definitely talked more about that type of focus, not just the impact of our grantee interventions recently than we have since I've been here.

Jessica McNab:

Thanks. That's helpful, and hopefully that helps answer your question. I see a question from Lindsay too. Let me scroll back to that. How did you collect the key questions that established the learning agenda?

Mary Hyde:

So, the way that it stands now, I felt that it was important to identify evergreen questions, if you will, so I deconstructed our mission statement, in essence, and, to some extent, deconstructed the more specific goals and objectives of our programs. And I crafted questions that, as long as this is our mission, these are relevant questions.

One of the things I feel like we've been struggling with is, you know, navigating what has to be long-term questions with very specific in-the-weeds research design, what are the specific research questions, you know, from very different funding streams and very different activities inside this agency, and capturing that in one place and one conversation. So, as this has emerged, I feel like this has started to become slightly different activities. So, you know, if this version, as it stands, gets approved by our CEO and continues on, at least for the next couple years, what folks will see in our learning agenda is a series of questions that will always be relevant. But they're relatively high-level questions, and you're not going to necessarily organize a particular research study or a particular single evaluation around the broad learning agenda questions for the agency. But it will be sub-questions and drilling down, again, based on the program, based on the office, based on the specific information need in this moment that I think will then live in more specific evaluation work plans that I can't ever imagine being, you know, part of the formal higher-level learning agenda, because it's just too in the weeds. It would be a 500-page document.

Jessica McNab:

Uh-huh. That makes really good sense. Thanks for sharing. Good question, Lindsay. Let's see, a couple of other questions for you. We'll see what ones we get through the chat, if folks want to raise their hand and ask a question verbally, which I think sometimes makes everyone nervous. But we will help unmute you if you need any help with any of the technology.

I was just thinking as we've heard from you and heard from others, some folks have talked about stakeholders in the process and, of course, the size of your agency and how complex this is, kind of stemming off of Lindsay's questions, you've pointed to these sort higher-level broad-brush policy questions. During this entire process, it sounded like, you know, you were in process before the Evidence Act came out. I imagine there were, at times, individuals, whether they be stakeholders or folks you worked that pushed back. So, how did you address any pushback from key stakeholders?

Mary Hyde:

Well, you know, every year, people have money they have to spend. I mean, let's just get down to brass tacks here. So, perhaps people who are reluctant at the beginning of the fiscal year, might start to feel differently towards the middle of the fiscal year when they realize there are some resources that they need to spend and that there's actually some questions that they need to address. You know, I don't think there's a simple answer to that. I will come back to relationship building.

I think there are two programs inside of our agency that, just based on relationships between our offices over time, initial resistance, some early wins have resulted in a very robust learning agenda that has been well underway for a couple of years, and is going to carry them into the next three to five years, because there's a level of partnership, trust, and buy-in, so that these programs started investing, slowly but surely, in their evidence building several years ago, so the momentum is there. So, this act, this learning agenda, whatever, just plug and play, they're well on their way.

There are other programs that are just not as far along. Some of it's dependent on specific leaders and whether or not their head was in this or not. Some of it is based on, you know, priorities and what the program may or may not be facing. But I would say that everyone has some toe in this. But I think if you were to sort of rank programs and offices in terms of their readiness and their use and their sort of buy into this, there's a range, and the reasons for those range have, you know, a number of factors. But I would say it just takes sort of persistence and coming back to the table and, you know, I have found that, at least in most cases, at some point the door opens and people are ready to have that conversation with you.

Jessica McNab:

Okay. Thanks for that. Maybe one last question before we wrap it up and thank Mary again for joining us. In the last seven years, you joined CNCS about seven year ago, but you've been doing evaluations for a number of years. Just given some of the momentum that you stayed with learning agendas in CNCS, what are you most proud of, to date?

Mary Hyde:

I am most proud of the signs that you can see of our work. And I would say a couple of examples of that; one, if you look at some of our notices of funding opportunities, you will see points for evidence, for grant applications that weren't there five years ago. I would say that, you know, you would see priorities listed in those notices of funding opportunity around specific interventions that we actually have a body of evidence for that didn't exist seven years ago. So, getting to Clint's point about the grantees, yes, that was a heavy push. But in many ways, that heavy push is bearing fruit, and so now we have very specific interventions that we can point to that, you know, we know are effective based on very rigorous designs, and more than one study. So, to me, that's a win.

I would say there is a couple of other infrastructure-type things that, you know, whether it's about disseminating our work, you know, something as simple as you can go on our website and there's an impact page where you can find our studies and you are look at our research grants. You know, that didn't exist seven years ago, so building that infrastructure, I think, to me, is a win and something I'm very proud of.

And I guess the last example I would give along the infrastructure line is, you know, when I showed up here, the research was very much focused around or National Service Program participants, and a lot of money had gone into surveying them and looking at their outcomes and their life course trajectories and things like that. Well, you know, we spent about four years creating the ability for that to just sort of be a standard survey that all members get, and it wasn't something that had to be extra or this or that. And to me, that sort of shows that that sort of question has become part and parcel for every program to ask, well, you know, what does this mean for the members.

So, I would say all of that is something that, you know, even though in the moment it might feel like you're spinning your wheels, if you look back and take the long view, you can see signs that this is where evidence starts to show up as being embedded inside everyday grant decisions and policies, inside of everyday operations and infrastructure that didn't exist, and it was all because of, you know, the hundreds of conversations we've been having with people about the value of data and evidence.

Jessica McNab:

Okay. Well, thank you. That was perhaps a nice note to wrap on pulling it all together. So, Mary, again, thank you for your time. I think what you've brought to the table and what you shared about your experience is really valuable to others, and I know folks have been pinging us left and right, asking about presentations. So, again, we'll go through some wrap-up details, but, again, one last thank you to you for joining this afternoon.

Mary Hyde:

Thank you for having me.

Jessica McNab:

Absolutely. Okay. So, if you've joined us before, and if not, as mentioned, a couple of times by both Amanda and myself, a couple of things; one, we have a few more webinars to put up. Mary was our third teacher/speaker, but we also have four more webinars coming up, and we are working around the clock on pushing those materials to our website, and we'll start to load those in as we're ready for each event. So, once we have that information, we'll push that through the federal evaluator Listserv, as well as Amanda and the rest of the team, asking to push that through other venues internally, so please stay tuned in terms of post-event materials by the recording transcript, things along those lines.

But, in addition, we have more webinars coming up. So, next week, Cynthia Phillips and Rebecca Kruse from NSF will join us on Thursday, August 8th. Note the time change. These webinars are usually from 3:00 to 4:00 p.m. Eastern Daylight Time. But we will also have one next week from noon to 1:00, so make sure you join us from noon to 1:00 next Thursday, August 8th, from NSF. We're excited about that.

Webinar five will be with Britney Borg from Business Association. That will be on Tuesday, August 13th. Again, that's a 3:00 to 4:00 p.m. Eastern Daylight time. Our sixth webinar with Emily Schmitt with ACF on August 28th, from 3:00 to 4:00 p.m. Eastern Daylight Time. And we have registration for that sixth webinar, and I see Chris and others are pushing the registration through the chat. It's a great live way to register for those events if you haven't already. That webinar with ACF, we're excited that that registration information is available from that office speak. If you're registered for others, great. If you haven't registered for this, get in there and register. Be happy to see you again at the end of August.

And as mentioned at the forefront of the webinar, we are working to reschedule our conversation with Tammy Tippie from DOD maybe, so more to come on that, but it will occur in August as well. So, thank you, Chris, for pushing all of those registration links through the chat. That's really helpful.

So, once you close out of webinar, you'll have a popup of our webinar evaluation. Again, we've taken your thoughts and feedback on each of these events, and we're continuing to review those to help improve the upcoming series, so feel free to include your responses. Very quick, hopefully should only take your less than a minute to respond to how the quality of today's webinar went. Did we meet the expectations in terms of the objectives for our event? Did you feel the content -- feel like there was actionability based on the content that you can take back to your organization? So, feel free to fill out that webinar evaluation. That will give us feedback for future webinars, and that's it.

So, that will wrap right on time at 4:00 Eastern Time. And, again, thank you for joining us this afternoon. We welcome any other feedback comments or questions that don't go in the webinar evaluation. You can contact us through our help desk, which is aspeevidencebuilding@mathematica-mpr.com. Thank you. Have a great afternoon.