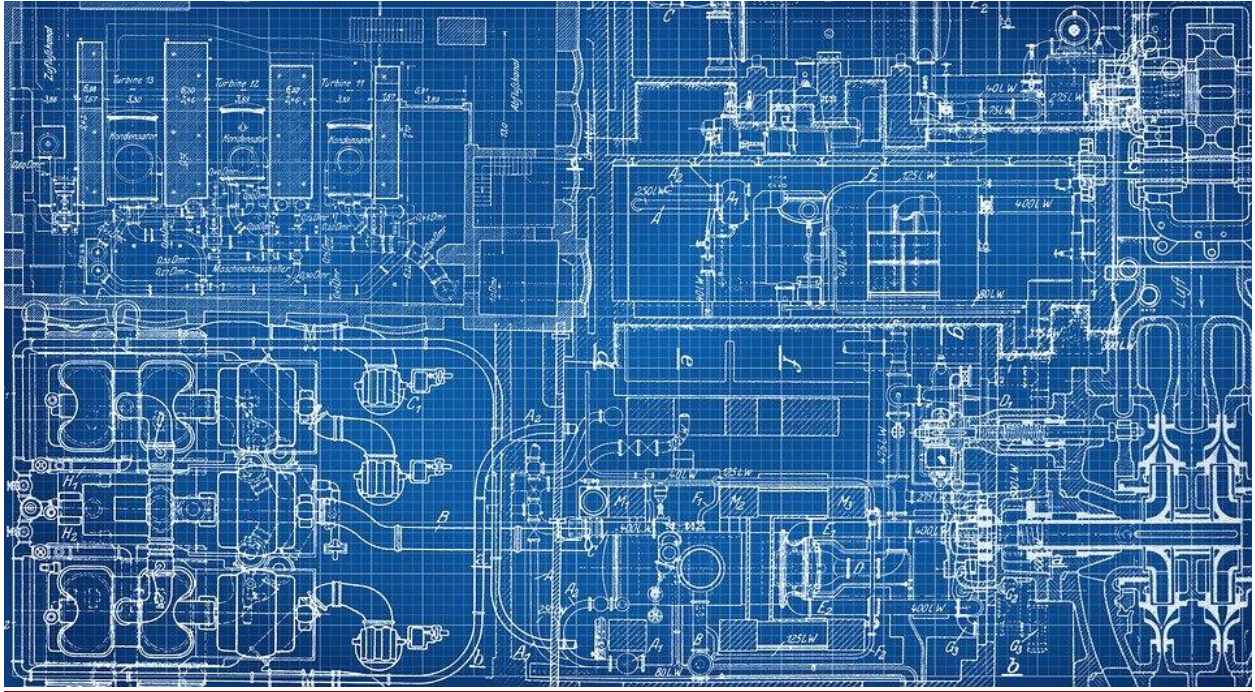




**USAID**  
FROM THE AMERICAN PEOPLE



**INFORMED:**  
**Learning Question Formulation**  
**in Eight Steps**

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## Why read me?

This document provides an overview of the eight steps that comprise the INFORMED approach to formulating learning questions and provides detailed instructions and resources on how to operationalize these steps. It is a step by step guide to help users formulate learning questions in a systematic and intentional way via three options for tailoring your formulation process to your needs and resources.

### What is a learning question?

According to the ADS 201: “Learning questions are specific, answerable, need-to-know questions that can be answered through monitoring, evaluation, research, or other analysis to address learning priorities incrementally. Several learning questions can cluster under a single learning priority and can contribute to a broader Learning Agenda or plan.”

### What is a Learning Agenda?

According to the ADS 201: “A systematic plan for identifying and addressing critical learning priorities and knowledge gaps through answering priority questions relevant to the programs, policies, and regulations of an Agency or at the sub-agency level. Learning agendas should articulate critical questions, how to address them, and how to use the resulting evidence. More broadly, a Learning Agenda is a coordination tool for engaging stakeholders in evidence planning and building.”

Learning agendas can be developed at different levels: activity, project, technical office, across a Mission, region, sector, or USAID. While there can be considerable overlap in questions, activity, project, and Mission-level Learning Agenda questions should be more embedded in and related to a specific context, while regional, sector, and agency level questions should be generalizable. Missions, for instance, could ask broad questions like what interventions are best suited to address a given DRG challenge, but ideally they would coordinate with sector and regional counterparts in asking and answering these questions to ensure learning is shared.

## Overview

The INFORMED approach consists of eight simple steps grouped into three phases of work which can often be completed together and concurrently if necessary.

Phase	Step
<b>DIAGNOSE</b>	Identify the learning priorities or gaps that learning questions will address.
	Narrow down which type of learning question is applicable and appropriate.
	Figure out who will use the information and evidence generated.
<b>DEVELOP</b>	Organize and take stock of existing learning questions and organize ideation sessions to brainstorm additional learning questions if appropriate.
	Review and reduce your learning questions by grouping/categorizing them to consolidate overlapping areas, simplifying their focus and prioritizing their importance.
	Make sure to validate and quality check the prioritized, grouped and/or short-list of learning questions.
<b>DECIDE</b>	Elect final learning question/s and revisit and/or develop a formal use case for final selected learning question/s
	Determine an appropriate learning or research activity and draft a short action plan to address learning question

Each step of the INFORMED approach has a distinct question and related resource.

<b>I Identify learning priorities</b>	What do we need to know more about?	<a href="#">Learning Inquiry Source Worksheet</a>
<b>N Narrow the user and use case</b>	Who and how will they/we use information and evidence generated?	<a href="#">Use Case Summary Template</a>
<b>F Figure out learning question type</b>	What type of question would be most useful?	<a href="#">Question Type Resource and Decision Chart</a>
<b>O Organize brainstorming for new questions</b>	What learning questions address our needs?	<a href="#">Use Learning Question-1 of Learning Question Workbook B</a>
<b>R Review and reduce by simplifying, consolidating and prioritizing learning questions</b>	What are the most critical learning questions to address our needs?	<a href="#">Use Learning Question-2 of Learning Question Workbook B</a>
<b>M Make sure to validate and quality check questions</b>	How can we improve, validate and vet our learning questions?	<a href="#">Learning Question Checklist</a>
<b>E Elect final learning questions</b>	Which learning question/s should we select to address?	<a href="#">Use Learning Question 4 of the Learning Question Formulation Workbook B</a>
<b>D Decide and determine appropriate learning activities and related action plans</b>	How will we address the learning question?	<a href="#">Question Action Plan Template</a>

Read the following guide that details the key question each step addresses, the task that the step is achieving, related resources and tips.

While each distinct step can be handled in the proposed sequential fashion, in practice it may make sense to address multiple steps concurrently in order to account for changing information and context. This can be particularly useful as plans are shared with colleagues and leadership which could necessitate changes across more than one step. If steps need to be consolidated and merged into concise convenings, [please see these suggested](#) facilitation ideas.

## When do I use this?

These steps can be used in a myriad of ways to tailor the resources and needs of a team or Mission. This document outlines a comprehensive way to formulate learning questions as a part of a Learning Agenda initiative. But the steps can also be condensed to produce learning questions for a learning plan or while developing learning questions or a Monitoring, Evaluation, Learning Plan for a strategy, project or activity.

## How do I do this?

The table below provides an overview of the eight steps that comprise the INFORMED approach to formulating learning questions and provides examples of how to operationalize each step based on low, medium and high levels of complexity. These roughly correspond to the level of effort required. The document divides up options between low complexity/level of effort, medium complexity/level of effort and high complexity/level of effort. However, the exact formulation process should be tailored to your specific needs and could combine elements from these three tiers depending on the specific needs and use case of the learning questions. The table flags two important tools to improve the quality and utility of the learning questions you are developing that occur during the Diagnose and Develop stages.

**Table 1: Options to Implement INFORMED approach**

Phase	Step	Low	Medium	High
<b>DIAGNOSE</b>	Identify the areas of inquiry to focus on generating learning questions.	Confirm and document the area of inquiry and the use case	Conduct consultations / preparatory work to identify and confirm learning priorities  Use this <a href="#">Learning Inquiry Source Worksheet</a> to document as appropriate.	Conduct formal meetings to identify and confirm learning priorities. For instance, facilitate a meeting/convening to ideate and identify areas of inquiry, identify appropriate learning question type and use case.  Following meeting/convening, share and validate with relevant stakeholders  Use this <a href="#">Learning Inquiry Source Worksheet</a> to document
	Figure out who will use the information and evidence generated.		Use the <a href="#">Use Case Summary Template</a> to document if appropriate. Share and validate with relevant stakeholders as needed.	Use either the <a href="#">Use Case Summary Template</a> , a more detailed spreadsheet addressing key user design questions, or the <a href="#">User Canvas</a> to complete and document a comprehensive user case. Share and validate with relevant stakeholders as needed.
	Narrow down which type of learning question is applicable and appropriate	<b><i>Review the Question Type Resource and Decision Chart and select the most appropriate type of learning question</i></b>		
		Complete above step.	Following the above step, share with a small group of stakeholders for validation.	Following the above step, validate the question type/s through a meeting, survey or other modality.  <a href="#">Use Learning Question 3</a> tab of the

Phase	Step	Low	Medium	High
				<a href="#">Learning Question Formulation Workbook</a>
<b>DEVELOP</b>	<b>Organize</b> brainstorming for new questions and if applicable collate existing sources of learning questions	Generate new questions and review existing sources as needed.	Individual work to review existing sources, reach out to relevant stakeholders to identify relevant sources.  Facilitate a meeting or convening to review and group existing sources, and/or ideate, identify and group new areas of inquiry. There may need to be multiple meetings to complete this step.	Individual work to review existing sources, reach out to relevant stakeholders to identify relevant sources.  Facilitate a meeting or convening to review and group existing sources, and/or ideate, identify and group new areas of inquiry. There may need to be multiple meetings to complete this step.  <a href="#">Use Learning Question-1 of Learning Question Workbook</a> to document the process and outputs.
	<b>Review and reduce</b> your learning questions by grouping/categorizing them to consolidate overlapping areas, simplifying their focus and prioritizing their importance.	Individual work to consolidate and simplify learning questions.	Individual work to consolidate, simplify and prioritize learning questions. Share with relevant stakeholders for feedback and comment.	Individual work to consolidate, simplify and prioritize learning questions. Share with relevant stakeholders for meeting preparation.  Facilitate a meeting or convening to review preliminary categorization, validate and consolidate. Additional meetings may be needed to determine a final prioritization of learning questions.  <a href="#">Use Learning Question-2 of Learning Question Workbook</a> to document the process and outputs.
	<b>Make sure</b> to validate	<b><i>Use the <a href="#">Learning Question Checklist</a> to review, refine and improve the learning question wording</i></b>		



Phase	Step	Low	Medium	High
	and quality check the prioritized, grouped and/or short-list of learning questions	Complete above step.	Following the above step, work to review and quality check the learning questions with relevant colleagues.  Share with a small group of stakeholders for validation.	Facilitate a meeting or convening to workshop and refine learning question by applying the learning question criteria.  Use <a href="#">Learning Question 3 of the Learning Question Formulation Workbook</a> to document process and record outputs.
<b>DECIDE</b>	Elect final learning question/s and revisit and/or develop a formal use case for final selected learning question/s	Select learning questions and share for review / clearance as appropriate.	Select learning questions and share with a small group of stakeholders for validation and feedback.	Organize and facilitate a leadership meeting / consultation to choose learning question.  Use <a href="#">Learning Question 4 of the Learning Question Formulation Workbook</a> to document process and record outputs
	Determine an appropriate learning or research activity and draft a short action plan to address learning question	Select an appropriate learning activity and task.	Individual work to determine relevant activity and share final action plan with a small group of stakeholders for comments and validation.	Individual work to determine relevant activity and draft final action plan.  Facilitate a meeting or convening to review the action plan document/s. Use the <a href="#">Question Action Plan Template</a> to document and detail plan.  Consider a learning plan product that details the process used, final learning questions, associated learning activities and/or products. The document could include a change

Phase	Step	Low	Medium	High
				log to note changes. Share final products with relevant colleagues.

The resources listed in this document can be found in [Workbook A](#) and [Workbook B](#).

## Formulation Steps

The following section presents the eight steps involved in the INFORMED approach.

### Identify learning priorities



#### Key question step addresses

What do we need to know more about?



#### Task

Clarify the areas of inquiry and learning priorities that you intend to focus on when generating learning questions. Areas of inquiry can draw on emerging patterns, cross cutting themes, critical assumptions and risks and knowledge gaps in the existing evidence base. It is critical at this point and throughout the formulation process to scan the literature to ensure that your questions are not addressed by existing work. If learning questions are addressed already, there is still a role for dissemination and utilization focused products and convenings.

Areas to focus on at the strategy, project and activity level could be the following:

#### Diagnosis

- Important sectoral knowledge gaps related to your programming

#### Design

- High probability/high risk assumptions that we need to pay attention to within your theory of change or theory of action

### Implementation

- Context shifts that may influence achieving our results or creating new opportunities for impact
- Feedback from end users on our performance
- Negative consequences - intended and unintended - of your work

### Evaluation

- Processes behind programming that contribute to achieving results
- Feedback from end users on our performance
- Negative consequences - intended and unintended - of your work

This is especially important for Learning Agendas that are cross-cutting, involve multiple teams or equities and/or are focused on addressing a question that is focused not on a specific intervention but on a type of intervention or group of similar interventions.

It is often useful to validate and vet learning priorities with external stakeholders including end beneficiaries in order to ensure that the learning priority is appropriate, relevant and actionable.



### Resources

[Learning Inquiry Source Worksheet](#)



### Tip

If designing a project or activity the area of inquiry would be the specific intervention or set of interventions

## Narrow the user and use case



### Key question step addresses

Who and how will they/we use the information and evidence generated?



### Task

Narrow and define who and how will the information and evidence generated be used and/or applied. It is useful to understand and explicitly articulate the purpose and use of information generated by any learning questions. This can drive the way a learning question is formulated or the way a learning activity is implemented and how and with whom information and evidence is shared and disseminated.

The key questions to address are:

- Who is the information for?
- What are you/they trying to learn?
- How will the information be used/applied?
- Who should be involved in this process?
- In order to be useful, by when would this information be needed?



### Resources

[Use Case Summary Template](#) - a simple and short template to detail use cases  
[User Canvas](#) - a comprehensive document to detail information regarding the use case; this is a complementary resource when there are potential obstacles to learning use.



### Tip

If you are struggling to identify a use case, consider dropping the question.

## Figure out learning question type



### Key question step addresses

What type of question would be most useful?



### Task

Review learning question type and determine which one is appropriate and relevant to your needs.



### Resources

[Question Type Resource and Decision Chart](#) - to understand the different learning question types and how to decide which one is appropriate



### Tip

It is beneficial to often have a mix of different types of learning questions to address multiple needs.

## Organize ideation sessions for new questions



### Key question step addresses

What learning questions address our needs?



### Task

#### **If applicable and appropriate, compile and review existing learning questions**

Compile a list of potential questions from existing sources. This can take the form of taking stock of previous questions that may have already been asked. Often there exist questions from evaluations, learning events or reports that can be used as a starting point to identify and cluster areas of interest. Theories of change can be a useful starting point to understand gaps in knowledge or assumptions that are made that can be rewritten as learning questions. In other cases, new knowledge exists but is not well known or internalized by stakeholders.

#### **Brainstorm learning questions**

Decide on how to structure and sequence brainstorming sessions. Either remote or in-person sessions such as brainstorming, surveys, or ideation workshops can be held with key stakeholders to produce a list of questions. These sessions can validate an existing list of questions but also allow space to generate new learning questions.

#### **Define key terms and learning question rationale**

In order to avoid multiple or conflicting interpretations of learning questions, it can be useful to define key terms and supplement a learning question with a short narrative explaining its rationale and what it is trying to address.



### Resources

[Learning Agenda Inventory](#); [Learning Question Formulation Spreadsheet](#); [See CLA Toolkit section on Engaging Stakeholders for methods and approaches to engage with stakeholders.](#)



### Tip

It can be useful to offer multiple and different opportunities to engage in validation and question development. Examples include providing for a remote solution through a Google Document or survey or holding in person facilitated workshops. This allows for the need to accommodate others' schedules and provide ample entry points. During the course of these sessions, learning questions may be rewritten or reframed; often it is best to leave wordsmithing to last and ask users to focus on the area of inquiry rather spending time on the particular question wording; however, sometimes wordsmithing is a necessary evil in order to obtain participation.

## Review and reduce learning questions by grouping, simplifying and prioritizing



### Key question step addresses

What are the most critical learning questions to address our needs?



### Task

Review and reduce your learning questions by grouping/categorizing them to consolidate overlapping areas, simplifying their focus and prioritizing their importance. Following these steps, it is helpful to produce a list of initial questions. Since the number of questions can be quite large, it can be helpful to categorize and cluster questions by a shared topic or theme. This can help to identify gaps of areas of inquiry as well as which topics are of most interest to users and decision-makers. In order to group, it can be useful to define any key terms and the interpretation of questions so that there is clarity around what the learning question is intended to address. If time permits, it can be useful to review the user and use case to ensure the learning questions address their needs.



### Resources

[Learning Question Coding Matrix](#) - to identify common or overlapping learning questions



### Tip

It can be useful to review your use case in order to inform the grouping and prioritization process to ensure that critical needs are addressed.



## Make sure to validate and quality check learning questions



### Key question step addresses

How can we improve, validate and vet our learning questions?



### Task

Review the appropriateness of each learning question based on utility, focus, feasibility, and inclusivity. See the [Learning Question Checklist](#) for more details.

When determining the feasibility of the learning question it can be helpful to preliminarily identify the learning activity or activities that could address the question. For example, the learning activity could entail a literature review, systematic review, gap map, evaluation, assessment, etc. [Check out the DRG L menu of services.](#)

Restate, if necessary, learning questions to capture overlapping or similar areas of inquiry.

If necessary, prioritize learning questions again.

Quality check the learning questions using the Question Checklist. If necessary, following using the Question Checklist, refine the wording of the learning question using criteria. If appropriate, refine the learning questions using feedback from stakeholders.

It is important to scan the literature again at this point to ensure that your questions are not addressed by existing work.



### Resources

[Learning Question Checklist](#) - use to assess draft learning questions; [Use Learning Question 3 of the Learning Question Formulation Workbook](#) to use in applying Learning Agenda checklist; [Learning Question Tip Sheet](#) - A set of tips geared towards strategy level learning questions;



### Tip

The most important constraint is time and level of effort to address and then use/apply evidence and learning. Prioritizing the number of questions to no more than three appears useful. Often a learning question may have sub or corollary questions associated with it that can be addressed depending on the methodology used to address the questions.

## Elect final learning questions



### Key question step addresses

Which learning question/s should we select to address?



### Task

Elect final learning questions and revisit and/or develop a formal use case for final selected learning question/s. Select final learning questions. This may necessitate prioritizing questions, if necessary.

Before prioritizing questions, establish the screening criteria. For example:

- How much time will it take to address it?
- How critical is the question to our learning purpose or use case?
- How important is the question to key stakeholders?
- How well aligned is the question with high-level priorities (e.g. USAID Policy Framework, Strategies, Presidential Initiatives)?

Following finalizing the criteria, apply the criteria to learning questions. Consider having more than one individual apply the criteria to validate the process. Following this, it may be necessary to refine the learning question to better address criteria. Consider re-applying the original criteria of learning questions if it makes sense.

The learning questions can then be ranked and a cut-off determined if appropriate before selecting the final learning questions. At this juncture, it may be necessary to share and obtain approval for the final questions.



## Resources

[Use Learning Question 2 of the Learning Question Formulation Workbook](#)

Tailor and use [Criteria Application Spreadsheet](#) and/or [Question Alignment Grid](#) to rank and prioritize learning questions by important factors or priorities.

## Decide and determine appropriate learning activities and action plans



### Key question step addresses

How will we address the learning question?



### Task

Determine an appropriate learning or research activity and draft a short action plan to address the learning question. Revisit and/or develop a formal use case for final selected learning question/s. For each learning question, develop an action plan. The action plan would plan implementation with a focus on use and seek to assign responsibilities, identify a timeline, and plan an appropriate monitoring approach. The plan could also include short-term activities to maintain user buy-in/engagement and long-term activities to ensure use over time and allow for more comprehensive methods to be used.



### Resources

[Question Action Plan Template](#), [Question Finding Template](#)



### Tip

The plan to implement learning activities should include a range of tailored and integrated dissemination activities and look to distill findings into accessible and short products. The learning questions would ideally also look to have a range of activities including those that could be conducted on a short term basis to maintain user buy-in and engagement while also conducting longer term activities to ensure use.