



LEARNING AGENDA

IN SUPPORT OF THE PRESIDENT'S MANAGEMENT AGENDA



President Biden opens the [President's Management Agenda](#) (PMA) by highlighting the importance of coming together — across agencies, States, communities, and sectors — to build an equitable, effective, and accountable Government that delivers results for all. No one entity can alone solve the problems our Nation faces, but together we can help address critical questions about the management of the Federal Government to help improve how Federal agencies operate, perform, and deliver to the American people. This is why the Office of Management and Budget (OMB) is proud to share the PMA Learning Agenda—a first-of-its-kind effort to address critical learning gaps that exist across Government, and to encourage research within, beyond, and in partnership with Government.



At the end of 2021, OMB released for public input a draft PMA Learning Agenda, which identified initial questions in three focus areas to support the PMA's priorities. We solicited feedback from the public to help further develop and refine these questions, and we received responses from individuals, academics, associations, and non-profit and other organizations. Commenters offered revisions to the draft questions, shared articles and background reading, and even suggested new questions. The questions you see in this final PMA Learning Agenda reflect this input.

Whether you are a researcher, student, practitioner, industry expert, public servant, a member of a community or philanthropic organization, or just passionate about improving Government, your role in this process is critical and

LETTER FROM JASON MILLER



does not end here. The Federal Government needs your help to answer these questions. OMB wants to hear from you about existing or new evidence-building and research activities. I encourage you to sign up for updates, and to share your efforts through the PMA Learning Agenda inbox at PMALearningAgenda@omb.eop.gov.

Thank you for your partnership and collaboration. Let's work together to answer some of the toughest and most pressing questions facing the Government.

A handwritten signature in black ink, appearing to read 'Jason Miller', written in a cursive style.

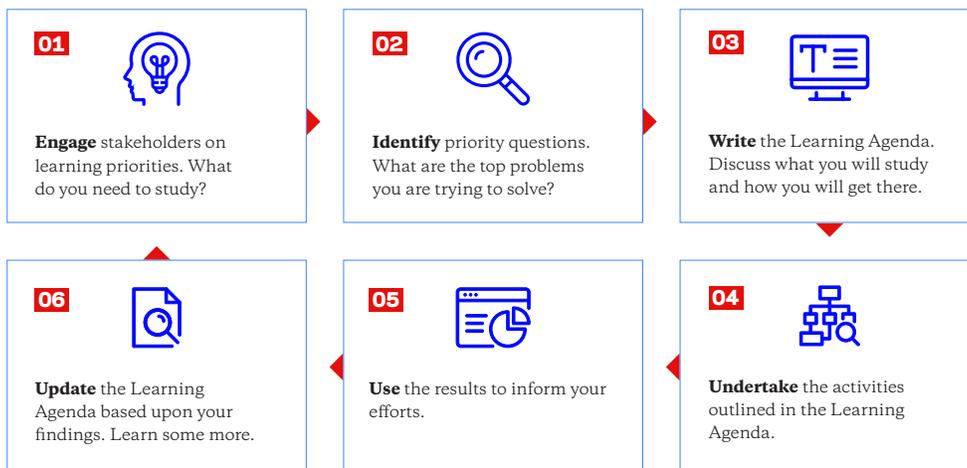
Jason Miller,
Deputy Director for Management,
Office of Management and Budget



The [President’s Management Agenda](#) (PMA) sets out key priorities for an equitable, effective, and accountable Government that delivers results for all.

In addition to these priorities, the teams working to implement the PMA have created goal statements and published priority-level success metrics to measure progress toward achieving the PMA vision. This management-focused Learning Agenda identifies key Government-wide questions to answer in support of the PMA. The questions below have been informed by input received from the public in early 2022, following the publishing of a draft PMA Learning Agenda in late 2021.

THE LEARNING AGENDA PROCESS



INTRODUCTION



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 the 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](#)

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.



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

This spring, Federal agencies published their comprehensive [Learning Agendas](#). These are an important milestone for implementation of the Foundations for Evidence-Based Policymaking Act of 2018 (Public Law 115-435). The agency Learning Agendas pose questions related to the agencies' specific operations and missions, many of which are relevant to the questions posed under this PMA Learning Agenda. Illustrative agency Learning Agenda questions aligned to the PMA Learning Agenda areas of focus are included for reference here.

INTRODUCTION



This PMA Learning Agenda identifies evidence gaps related to advancing PMA priorities. In addition, the American Rescue Plan Implementation Team released a [learning agenda](#) related to equity and the implementation of the American Rescue Plan. 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. Looking ahead, as these learning agendas spur research, the Office of Management and Budget (OMB) will work to share findings with leadership across the Government to inform decision making.

HOW YOU CAN HELP

Anyone can help answer these questions, including you. You might be a researcher, student, practitioner, industry expert, or public servant. You might be from a government agency, a community organization, a university, a business, or a philanthropy. Read on for more.

WHAT ARE THE LEARNING AREAS OF FOCUS?

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

The questions on the following pages are framed in the context of the Federal Government. However, research conducted beyond the Federal Government, including in the private sector, and at other levels of government, 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.

In their agency Learning Agendas, more than half of agencies included questions on the Federal workforce. A few illustrative questions from those published agency Learning Agendas:

- » **Office of Personnel Management**: What strategies are effective for increasing and maintaining the capacity of the Federal workforce to meet critical agency needs?
- » **Commerce**: How could the Department's leadership development programs be more effective in supporting succession planning?
- » **Treasury**: How can Treasury increase representation with respect to its public-facing call-center workforce?

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 career series? 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?
- To what extent, and through what mechanisms (for example, USAJobs and other application forms and processes, interview questions and format, time to wait for response or decision), might specific requirements (including security clearances) impact Federal recruitment of a diverse, inclusive workforce?
- What barriers to entry into Federal service currently exist for potential Federal employees? How do these barriers vary across demographic populations?
- How can the Federal Government organize work, workplaces, and workforces to create a competitive advantage for recruitment and retention? What workplace flexibilities and strategies, including those related to pay and benefits, promote equity, diversity, inclusion, engagement, and performance?

What strategies improve retention, engagement, inclusion, belonging, 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 customer experience initiatives inform improvements to the Federal employee experience?
- Which inclusion and belonging interventions reduce burnout and improve wellbeing and retention, and under what circumstances?
- 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 management strategies improve agency and unit-level organizational health? Which strategies and approaches are less effective?
- What strategies are effective in boosting career growth (including rotations, fellowship programs, mentorship 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? Which strategies and approaches are less effective?



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

A key priority of the PMA 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. The Biden-Harris Administration has already taken steps toward improving the way Federal agencies deliver services by identifying important life experiences, such as approaching retirement or recovering from a disaster, that require interaction with the Federal Government. The selected interactions are crucial for improving outcomes and reducing burden for all Americans, and can be found on the [Performance.gov customer experience page](#). However, 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.

In their agency Learning Agendas, more than half of agencies included questions on customer experience and service delivery. A few illustrative questions from those published agency Learning Agendas:

- » **Small Business Administration:** How do SBA customers feel about their experience with SBA programs and services, and how can the SBA improve this experience, especially for small businesses that are underserved?
- » **Social Security Administration:** What are the effects of simplifying administrative rules and requirements on reducing the burden on program participants and supporting program integrity?
- » **United States Department of Agriculture:** How effective are existing Rural Development Initiatives (e.g., eliminating unnecessary paperwork, improving stakeholder outreach, providing technical assistance to applicants, etc.) in improving equitable program access to historically disadvantaged and underserved communities?

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? What approaches are effective in reducing burden consistently across different populations?
- 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:

- What mechanisms for integrated services across different levels of government, communities, and community organizations are effective for reducing the burden on and improving outcomes for customers at specific significant moments in their lives? What kinds of collaboration between Federal agencies and their program delivery partners (e.g., State, local, Tribal, Territorial, nonprofit, and industry) contribute to improved equity and programmatic outcomes?
- How can Government services be more efficiently and effectively integrated and bundled to better deliver results for people?
- What strategies are effective to support individuals as they navigate complex Government processes? In what cases do people need individual support to navigate a complex Government process (e.g., a community navigator), 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 and when can customer feedback on their trust in Government be most useful and accurate?
- How can agencies effectively share and use customer experience data and program results to promote trust with the public?
- How do various touch points between a person and Government services affect trust in Government? To what degree is trust affected by 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? What types of choices in design and wording throughout service experiences promote inclusivity, and reduce stigma or other psychological barriers in program delivery?

- What communications strategies (language, channels, frequency) are effective for building trust? What type of transparency and accountability efforts have been effective at building trust? Who are these efforts currently reaching and who do they need to reach to be effective? Does transparency itself increase public 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 Government-wide 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. To read more about this work, see the [agency equity plan snapshots](#) and the [agency equity assessments](#). The questions below are focused on learning how advancing equity can benefit all.

In their agency Learning Agendas, most agencies included questions on equity. A few illustrative questions from those published agency Learning Agendas:

- » **Education**: What policies, programs, services, and practices support the design of learning environments and educational experiences that are effective in reducing gaps in student opportunity and achievement — such as those exacerbated by COVID-19 — including those that are responsive to the assets and needs of underserved students?
- » **U.S. Agency for International Development**: How can USAID more equitably engage local knowledge, assets, and practices, and align programming with local priorities and metrics for success?
- » **Housing and Urban Development**: How can Federal policy most effectively support equitable community development, place-building, and quality of life improvements in American communities?

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 (Public Law 116-136), the American Rescue Plan Act (Public Law 117-2), the Infrastructure Investment and Jobs Act (Public Law 117-58), and related legislation) 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 approaches to data collection and analysis could improve understanding about service utilization among underserved populations?

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?



How was the PMA Learning Agenda developed?

At the end of 2021, OMB released for public input a draft PMA Learning Agenda, which identified initial questions in three focus areas to support the PMA's priorities. OMB solicited feedback from the public to help further develop and refine these questions, and OMB received responses from individuals, academics, associations, and non-profit and other organizations.

How were the PMA Learning Agenda questions selected?

The PMA Learning Agenda prioritizes questions that:

- ✓ Advance one or more of the **PMA priority areas**
- ✓ 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, Tribal, and Territorial implementation of Federal programs
- ✓ Have **relevance beyond** the Federal Government and may engage 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 are appropriate to answer the question of interest (e.g., qualitative methods 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.



What's next for the PMA Learning Agenda?

OMB is working closely with agencies to initiate and support evidence building, research activities, and evaluations in support of this PMA Learning Agenda and agency Learning Agendas. Agencies have published and begun implementing their Learning Agendas, seeking to answer the questions posed, many of which are aligned with the questions posed in this PMA Learning Agenda. In fiscal year 2023, OMB intends to share an update on PMA Learning Agenda efforts.

HOW YOU CAN HELP

You can help answer these questions, whether you are a researcher or a public servant, from industry, a community organization or a philanthropy.

- Join efforts to create research that is shared with and used by decision makers in Government
- Share your research, thoughts, or questions by emailing PMALearningAgenda@omb.eop.gov
- Join the evidence infrastructure of the Federal Government as a program evaluator, data scientist, or science and technology policy analyst as an employee
- Sign up for [updates on the latest progress and to participate in events](#)
- View [Agency Learning Agendas](#) and other resources at www.evaluation.gov



Related Efforts

Each of the questions in this 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.

Learning agendas and evidence building

- [Agency Learning Agendas](#)
- [Fact Sheet: Biden-Harris Administration Launches Year of Evidence for Action to Fortify and Expand Evidence-Based Policymaking](#)
- [Advancing Equity through the American Rescue Plan](#)
- 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)



- [OMB Memorandum M-21-25](#), Integrating Planning for A Safe Increased Return of Federal Employees and Contractors to Physical Workplaces with Post-Reentry Personnel Policies and Work Environment (June 10, 2021)
- [Executive Order 14035: Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce](#) (June 25, 2021)
- President’s Management Agenda Priority Area 1 - Strengthening and Empowering the Federal Workforce [page](#)

Delivering services

- [Executive Order 14058: Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government](#) (December 13, 2021)
- President’s Management Agenda Priority Area 2 - Delivering Excellent, Equitable, and Secure Federal Services and Customer Experience [page](#)
- Federal Customer Experience [blog](#)
- Federal Customer Experience Life Experiences [page](#)

Advancing equity

- [Executive Order 13985: Advancing Racial Equity and Support for Underserved Communities Through the Federal Government](#) (EO 13985) (January 20, 2021)
- [Agency Equity Assessments](#) (required by EO 13985)
- [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](#)
- [President Biden’s FY 2023 Budget Advances Equity - Press Release](#) (March 30, 2022)