

## C.9: Sample – Interagency IDS Retreat Agenda

An interagency retreat can be helpful in establishing shared expectations for your IDS, building agency buy-in, and prioritizing your IDS research agenda. You may find a retreat useful at the beginning of your IDS process, or as a strategy for refocusing or reinvigorating your IDS as it evolves. The meeting agenda template below can be customized to fit your local context and stage of development but should always include some level-setting up front about the scope of your integration effort and how individual privacy will be protected.

*Recommended meeting length:* 2-3 hours

*Recommended attendees:* agency leaders and staff involved in research, evaluation, and policy analysis

Questions to ask yourself when planning a retreat:

- › What agencies have already expressed interest in integrating data?
- › What agencies hold high-value data but have not yet been engaged?
- › What decisions have already been made?
- › What decisions need to be made?
- › How can agency leaders and staff be most helpful in informing those decisions?

### INTERAGENCY RETREAT SAMPLE AGENDA

| AGENDA ITEM   | RECOMMENDED LENGTH | NOTES  |
|---|--------------------|--|
| <b>Registration &amp; Breakfast or Lunch</b>  | 30 minutes         |  |
| <b>Welcome &amp; Introductions</b><br>Who are we?<br>Why are we here today?   | 5-10 minutes       | Led by a core IDS planning team member with strong communications skills   |
| <b>Opening Remarks</b><br>Why is this IDS a priority?<br>What do we hope to achieve?  | 5-10 minutes       | Can be as formal or informal as you like but should feel like a cheerleading moment and be led by a high-level champion of the work (policy-makers, agency head, etc.)   |
| <b>Framing the Effort</b><br>Who else is doing this work?<br>What lessons can we learn from them?<br>Why is it important that it's done with strong community engagement?   | 10-15 minutes      | This is often best led by an outside expert or guest from a neighboring IDS  |
| <b>Level-Setting</b><br>Where are we in the IDS development process?<br>What is this IDS and what is it not?<br>How will data uses be approved and by whom?<br>How will individual privacy be protected?  | 15-30 minutes      | Led by a core IDS planning team member with strong communications skills   |
| <b>Break</b>  | 10 minutes         |  |
| <b>Small Group Discussion- Within Agency</b><br>What are your agency's highest priority policy, research, and evaluation questions?<br>Which of these questions requires data from other agencies to be answered meaningfully?<br>Which datasets or data points would you need and who collects them? | 30-45 minutes      | This is designed to surface the "what's in it for me" of data sharing for each agency and create an initial list of potentials high-priority IDS use cases.<br><br>Use chart paper to record the brainstorm at each table. |
| <b>Break/transition time</b>  | 10 minutes         |  |
| <b>Small Group Discussion- Interagency</b>  | 15-30 minutes      | Rotate seating so that each table includes representatives from several agencies and then repeat the first exercise.   |
| <b>Gallery Walk or Dot Voting</b><br>Which of the questions that have been brainstormed are highest priority, which are most doable, which are most fundable, etc.?   | 10-15 minutes      | This is a time to allow all participants to browse the brainstorms created by other tables. You may also ask participants to vote for their highest priority use cases using stickers or simply initials.                  |
| <b>Closing &amp; Next Steps</b>   | 5-10 minutes       |  |