OEDA Planning Retreat | August 2025

Jason Wallin, OEDA Manager

# Our mission

*OEDA provides timely, objective, and independent research and analytics, enabling Oregon’s human services agencies to make informed, effective, and equitable decisions for the well-being of Oregonians.*

# Retreat principles and expectations

* **Required, but not oppressively.** You do not need to rearrange leave you have already requested to attend. Your input will be missed, but we will return to these topics in the future. If you are not on leave, please arrange your work schedule so you can attend all three days from 8-5.
* **Purpose-driven.** Our discussions should be anchored in our legislative mandate to “support integration and analysis of client and customer service information across state agencies and programs [and …] provide coordination, consolidation, and clear accountability for that work.”[[1]](#footnote-1)
* **Solutions-focused.** Identifying issues and frustrations is important. But we should introduce these to set up work to find solutions, not just list the problems. We will focus on what we can do, what we can propose, or what we can request of others, to make it possible for OEDA to return to our purpose.
* **Action-oriented.** We will generate concrete outputs and actionable plans.
* **Inclusive.** If you are regularly an active contributor, please make sure that you leave time for others to contribute, perhaps even before you. If you do not regularly speak up, please plan to contribute during the retreat.

Please plan to have your camera on during the retreat. The chat can absolutely be used for sharing links and references to resources appropriate to the current conversation. But please refrain from using the chat to comment or introduce new ideas—let’s not ask one another to have to track multiple conversations.

# Agenda

## Tuesday, August 5: Our core identity (System 5) and what we do (System 1)

1. 8:05a – 8:30a: Welcome & kick-off
   1. Icebreaker: “Imagine a future where OEDA is what it could be, maybe what you thought it was when you were hired. What is an example of a project that only OEDA, uniquely, could do?”
2. 8:30a – 9:00a: Introduction to the Viable System Model
   1. System 1: Our core value to others
   2. System 2: Addressing friction & harmonizing work; avoiding paralysis, oscillations, and conflicts
   3. System 3: OEDA management—rules, resources, rights, and responsibilities
   4. System 4: Outside intelligence
   5. System 5: Our identity, purpose, vision, and values
3. *9:00a-9:05a: Brief break*
4. **9:05a-10:00a: System 5 | Our identity, purpose, vision, & values**
   1. “What is the essence of our legislative mandate? If we truly fulfilled it, what would be different for state agencies? What values must guide us?”
      1. Resources: ORRAI strategic plan, ODHS/OHA mission, vision, and values
   2. Write (10 min): “What is the essence of our legislative mandate? If we truly fulfilled it, what would be different for state agencies? What values must guide us?”
   3. Pair (30 min) –
   4. Share: 35

1. Oregon Legislative Fiscal Office. (2015). “2015-17 Legislatively Adopted Budget: Detailed Analysis” (p. 109). <https://www.oregonlegislature.gov/lfo/Documents/2015-17%20LAB%20Detailed%20Analysis.pdf>   [↑](#footnote-ref-1)