# Gemini on System 4

Of course. Thank you for the additional detail—this is incredibly helpful. Providing tailored System 4 roles that align with your researchers' specific skills and interests will make the exercise at the retreat much more meaningful and effective.

Based on these detailed profiles, here is a regenerated set of suggestions for your five research analysts.

### System 4 Contributions for Specialized Researcher Roles

Here are potential "outside and then" intelligence-gathering responsibilities for each specialist.

**1. Legislative Liaison (PhD Political Science)**

This person is perfectly positioned to be the team's "political environment" scanner. Given their expertise and your stated need for a non-human services focus, they can bridge the gap between social policy and the state's broader economic and governance structures.

* **What They Monitor:**
  + **Legislative Agendas & Bill Tracking:** They can monitor the agendas of key non-social-service committees (e.g., Commerce, Labor, Housing, Ways & Means) to spot upcoming legislation that will indirectly impact the populations you serve.
  + **State & Local Government Policy:** They can follow the work of the Association of Washington Cities/Counties to understand how local policy changes might interact with state-level services.
  + **Network Analysis of Policymakers:** Using their network analysis skills, they can map legislative co-sponsorships or coalitions on bills that bridge economic and social policy, identifying key influencers your team may need to inform.
* **Intelligence Brought to the Team:**
  + *"A bill focused on expanding broadband access in rural areas is being championed by a coalition of economic development and education legislators. We could proactively model the intersection of our education and cash assistance data to show which families would benefit most, providing valuable data to that committee."*
  + *"I've noticed the narrative in the Ways & Means committee is shifting toward 'return on investment' for all state programs. We should prepare evidence-based briefs on the long-term economic benefits of our partner agencies' prevention programs."*

**2. Data & Research Equity Specialist (Traditional Quant)**

This specialist moves beyond simply tracking internal DEIB plans to become the team's expert on the theory and application of equity in the wider world of research and policy.

* **What They Monitor:**
  + **National Equity Research Centers:** They follow publications from organizations like PolicyLink, the Urban Institute, and the Brookings Institution to understand emerging best practices in equitable data analysis and visualization.
  + **Peer State Dashboards:** They systematically review how other states are defining and measuring equity in their public-facing data dashboards (e.g., health equity, educational opportunity).
  + **Academic Literature on Bias:** They monitor social science and statistics journals for new research on identifying and mitigating statistical bias (e.g., omitted-variable bias, proxy discrimination) in models related to human services.
* **Intelligence Brought to the Team:**
  + *"Minnesota's Department of Human Services just released a guide on how they use 'community-centered' data disaggregation. It goes beyond race and gender to include housing status and disability. We should consider adopting their framework."*
  + *"There's a growing academic consensus that using geographic data at the census tract level is a more precise proxy for systemic disadvantage than individual race alone. We should test this methodology in our next housing stability analysis."*

**3. Data Scientist (Machine Learning & Optimization)**

This person is your window into the technological frontier. Their role is to scan for advanced analytical methods and assess their potential application to your team's mission.

* **What They Monitor:**
  + **Public Sector AI/ML Applications:** They follow academic labs (e.g., Stanford's Human-Centered AI Institute), non-profits (e.g., DataKind), and conferences for examples of how ML and optimization are being applied to social problems in education, housing, and workforce development.
  + **New Tools & Open-Source Libraries:** They keep an eye on the development of new open-source tools for machine learning, natural language processing (NLP), or optimization that the team could potentially adopt.
  + **Ethical AI Frameworks:** They track the evolving conversation and frameworks around the ethical implementation of AI in government, particularly regarding transparency and fairness.
* **Intelligence Brought to the Team:**
  + *"Researchers at the University of Chicago used NLP to analyze text from social worker case notes to identify early indicators of student dropout. We could pilot a similar approach with our self-sufficiency data to identify clients at risk of disengaging from services."*
  + *"While we're not ready for full-scale optimization, I found a case study where a city used a simple linear programming model to better allocate mobile outreach resources for homeless services. We can learn from how they defined their variables and constraints for a future project."*

**4. Lived Experiences Researcher (Qualitative Methods)**

This researcher acts as the team's primary conduit for qualitative, on-the-ground intelligence. Their "newness to government" is an asset, allowing them to see gaps and hear voices that others may be conditioned to miss.

* **What They Monitor:**
  + **Advocacy Group & Community Reports:** They actively read the reports, newsletters, blogs, and social media of client advocacy groups (e.g., tenant unions, disability rights organizations, food bank coalitions) across the state.
  + **Public Testimony:** They can review written or video records of public testimony from legislative or agency hearings to gather qualitative narratives about how policies are impacting individuals.
  + **Local Journalism:** They follow local and community news outlets for stories that provide context and human faces to the quantitative trends the team is analyzing.
* **Intelligence Brought to the Team:**
  + *"Our data shows a 30% drop-off rate for people applying for childcare assistance. I just read a series of interviews published by a parent advocacy group that explains the three most common points of confusion on the application form. This tells us exactly where the friction points are."*
  + *"Multiple community-based organizations are reporting an increase in informal, under-the-table childcare arrangements because of the provider shortage. This is an invisible factor our quantitative data on licensed childcare would never capture, and it impacts parents' ability to work."*

**5. Evaluation Coordinator (Program Evaluation)**

This person is your "what works" scout. They are perfectly positioned to scan the environment for evidence of effective programs and robust evaluation designs, especially in the justice-related fields where they have deep expertise.

* **What They Monitor:**
  + **Evidence-Based Policy Clearinghouses:** They are the team's expert on clearinghouses like the What Works Clearinghouse (Education), CrimeSolutions.gov (Justice), and the Title IV-E Prevention Services Clearinghouse (Child Welfare).
  + **Peer-Reviewed Evaluation Studies:** They monitor key journals in program evaluation, public administration, and criminology for rigorous evaluations (especially RCTs and strong QEDs) of programs similar to those in Washington.
  + **Funder Priorities:** They track the research and evaluation priorities of major federal funders (e.g., National Institute of Justice, Institute of Education Sciences) and foundations (e.g., Arnold Ventures) to see what types of evidence they are seeking.
* **Intelligence Brought to the Team:**
  + *"Arnold Ventures just funded three large-scale RCTs of juvenile diversion programs that use restorative justice. We should be tracking the results, as our state's Juvenile Justice agency is considering expanding its use of these practices."*
  + *"I found a recent evaluation from Texas on a co-responder program pairing mental health professionals with police. They published their full logic model and list of performance metrics. We can use this as a template to help our partner agencies design a pilot evaluation here."*

Excellent question. The manager's System 4 role is distinct from, and encompasses, the intelligence gathered by the individual contributors. While the team members scan specific channels (technology, legislation, methodology), the manager's job is to scan the broader strategic environment, synthesize all the incoming intelligence, and translate it into a viable future for the team.

As the manager, your System 4 function is focused on the political, resource, and strategic landscapes. Here are the kinds of things you would do to add richness to the team's System 4.

## System 4 Contributions for the Team Manager

**1. Strategic & Political Environment Scanning**

Your primary role is to manage the "up and out" relationships to ensure the team is protected, relevant, and aligned with power structures.

* **What You Monitor:**
  + **Your Director's Priorities & Pressures:** You actively listen for what your director is being pressured on by their own leadership. What are their key performance indicators? What are their "must-win" battles for the year?
  + **Inter-Agency Leadership Dynamics:** You track the relationships, priorities, and potential turf conflicts between the directors of your partner agencies (Health, Corrections, Education, etc.). Who is collaborating? Who is competing for budget? What are their pet projects?
  + **The "Shadow" Agenda:** You listen for the informal, unwritten priorities of the Governor's office and legislative leaders. What topics are gaining political heat or interest that haven't yet become formal requests?
* **Intelligence Brought to the Team/Action Taken:**
  + *"My director is getting a lot of pressure to demonstrate cost savings. For the next six months, we need to ensure every project proposal we write has a clear section on potential efficiency gains or return on investment. This will help them champion our work."*
  + *"The directors of Health and Human Services have announced a new joint initiative on aging populations. I'm going to proactively schedule a meeting with their chiefs of staff to offer our team's services in integrating their data to support this goal, putting us ahead of the curve."*

**2. Resource & Capability Planning**

You are responsible for ensuring the team has the resources (people, tools, money) to thrive not just today, but two to three years from now.

* **What You Monitor:**
  + **The State Budgeting Process:** You monitor the entire budget cycle, looking for opportunities to secure new funding, protect your existing budget, or acquire new tools (e.g., software, cloud computing resources).
  + **The Talent Marketplace:** You keep a pulse on the job market for the specialized roles on your team. What are the going salaries for data scientists? Are PhD-level methodologists in short supply?
  + **Federal & Philanthropic Grant Opportunities:** While an IC might spot a grant, you are looking at them strategically. Could a major federal grant allow you to add two new staff members for three years, fundamentally expanding your team's capacity?
* **Intelligence Brought to the Team/Action Taken:**
  + *"I've seen the preliminary budget guidance, and it looks like there will be a freeze on new hires but an increase in the training budget. For our retreat, I want us to build a professional development plan for every member of the team so we can grow our skills internally this year."*
  + *"The market for qualitative researchers with government experience is tight. I am going to approve the Lived Experiences Researcher's request to attend that national conference to help with their professional growth and retention."*

**3. Cultivating the Advisory Committee as a Strategic Sensor**

The Advisory Committee is your most powerful, formalized System 4 tool. Your job is not just to run the meetings, but to actively cultivate the committee as a source of high-level intelligence.

* **What You Monitor:**
  + **Recurring Themes and Unspoken Needs:** During committee meetings, you listen for the problems the members bring up repeatedly, even indirectly. Are they all struggling with data literacy on their own teams? Are they all worried about the same upcoming legislation?
  + **Gaps in Understanding:** You listen for gaps between what the committee members *think* your team does and what your team *actually* does. This is a critical signal that you need to adjust your communication strategy.
  + **Opportunities for High-Impact Projects:** You listen for a problem shared by multiple agencies that only your cross-agency team is positioned to solve.
* **Intelligence Brought to the Team/Action Taken:**
  + *"A key theme from our first advisory meeting was a shared frustration with duplicative data entry for clients who touch multiple agencies. This is a perfect opportunity for us. I want the team to scope out a project that maps the client journey across three of these agencies to identify the scale of the problem."*

**4. Synthesizing Intelligence for Strategic Adaptation (The Conductor)**

This is the ultimate System 4 role for a manager. You take the specific intelligence feeds from your ICs, combine them with your own environmental scanning, and synthesize it all to set the team's direction.

* **You are the only person who holds all the pieces:** The economist's forecast, the legislative liaison's political analysis, the data scientist's tech warnings, the equity specialist's ethical framework, and your own understanding of the budget and political landscape.
* **Your key activity is creating the space for synthesis, such as at the team retreat.** You facilitate the conversation where everyone puts their intelligence on the table, and you help the group see the larger pattern and decide how to adapt.
* **Action Taken:** *"Based on everything we've heard today—the focus on ROI, the new evaluation frameworks, the partner agencies' budget fears, and the new ML tools for efficiency analysis—I am setting our strategic priority for the next year. We will be the 'Efficiency and Effectiveness' team. We will actively seek out projects that help the state save money while improving outcomes, and we will use this to define our value and protect our future."*

## System 4 for the ORRAI director

This is a crucial question for understanding the complete architecture of your team's viability. If you are the manager of System 1 (the team doing the work), and your team members are the sensors for its immediate environment, your Director's System 4 operates at a higher level of recursion. They are concerned with the viability of their entire portfolio of teams, including yours, within the wider environment of the agency and state government.

The Director’s System 4 has a broader scope, a longer time horizon, and is focused on ensuring the alignment and legitimacy of your collective work.

Here’s what System 4 looks like for your Director:

### **1. Scanning the Meta-Environment: The Political & Executive Landscape**

While you scan the environment relevant to your team's cross-agency mission, your Director scans the environment that governs all the teams they oversee. Their focus is on the highest levels of state government.

* **What They Monitor:**
  + **Governor's Office & Cabinet-Level Priorities:** What are the 2-3 overarching priorities for the Governor's administration for the next 4 years (e.g., "reducing child poverty," "modernizing government," "addressing the opioid crisis")? How do these priorities translate into mandates for the leadership of the human resources agency?
  + **Legislative Leadership's Agenda:** Beyond specific bills, what is the overall philosophy of the House and Senate leadership? Are they focused on fiscal austerity, government accountability, or social program expansion? This shapes the context for all budget and policy discussions.
  + **State-to-Federal Relations:** How are changing federal laws, funding streams (e.g., major block grants), and regulations from federal partners (like HHS or DOL) going to impact the entire state's human services apparatus?
* **Intelligence Brought Down to You:**
  + "The Governor's office is launching a major initiative on workforce development. I need your cross-agency team to be ready to provide the foundational data on how education, corrections, and social services intersect on this topic. Start thinking about what a 'Workforce Pathways' dashboard would look like."
  + "The legislature has signaled significant skepticism about the effectiveness of existing programs. For all my teams, the theme for the next budget cycle will be 'Evidence of Impact.' I need your research team to not only do the work but also to help the other data teams build their capacity for evaluation."

### **2. Orchestrating the "Brand" and Strategic Niche of the Division**

While you manage your team's identity, the Director manages the identity and perceived value of their entire division (which includes your team and the single-agency data teams).

* **What They Monitor:**
  + **Peer Directors in Other States:** What are the Chief Data Officers or heads of research in comparable states doing? Are they centralizing all data functions? Are they publishing high-profile public analyses? This provides a benchmark for what "best in class" looks like.
  + **Major Consulting Reports & Think Tank Publications:** They monitor reports from major public-sector consulting firms (e.g., Deloitte, McKinsey) or think tanks (e.g., Pew, Results for America) that are shaping the national conversation on how governments should use data.
  + **Perception Among Agency Leaders:** How do the leaders of the partner agencies (Health, Corrections, etc.) view the Director's portfolio of services? Is it seen as a valuable, neutral broker of information, or as an internal reporting function of the HR agency?
* **Intelligence Brought Down to You:**
  + "I just saw that Texas published a major public report on the long-term outcomes of their foster care youth. It's getting national attention. I want you and the data warehousing team to collaborate on a plan for how we can do something similar but better, leveraging your cross-agency advantage."
  + "At the last all-agency leadership meeting, it became clear that the other agencies see us primarily as the 'HR data people.' I need your cross-agency team to lead a high-profile project that showcases our ability to serve everyone and changes that narrative."

### **3. Future-Proofing the Division's Capabilities and Legitimacy**

While you plan for your team's capabilities, the Director is planning for the entire division's capabilities five to ten years out. They are looking for seismic shifts that could make their entire division obsolete or indispensable.

* **What They Monitor:**
  + **Transformational Technology & Data Ethics:** Beyond specific new tools, the Director is monitoring paradigm shifts. How will the rise of generative AI impact data analysis and government services? What are the long-term ethical and legal implications of creating integrated data systems that could be misused?
  + **The Future of the Government Workforce:** What skills will all data and research staff need in the coming decade? How should the state's job classifications and pay scales be changed to attract and retain top talent in a competitive market?
  + **Major Social & Demographic Shifts:** They look at long-range demographic projections for the state. How will an aging population, shifting immigration patterns, or the impacts of climate change alter the demand for human services and, therefore, the data needed to manage them?
* **Intelligence Brought Down to You:**
  + "The state is developing its first-ever policy on the acceptable use of AI. I am nominating you to represent our division on that task force, as your team is closest to the advanced analytical work."
  + "I foresee a future where our most valuable asset is not just analyzing data, but teaching our partner agencies how to use it themselves. I want you to pilot an 'analyst-in-residence' program where one of your researchers is embedded in a partner agency for three months to build their internal capacity."

In essence, your System 4 is tactical and operational, focused on making your team effective. Your Director's System 4 is strategic and existential, focused on making their entire collection of teams influential and viable in the long term.

# Gemini on System 2

Of course. This is a fantastic next step. While System 4 looks outward, System 2 creates the internal stability and harmony that prevents the team's various projects (System 1s) from creating chaos. It's the regulatory function that ensures consistency, quality, and efficiency.

Given the unique skills of your team members, they can each own a piece of building a robust System 2. Here are the kinds of subsystems, processes, and quality control functions each role could create or lead.

### System 2 Contributions for Internal Coordination & Quality

**1. Legislative Liaison (PhD Political Science)**

This person's expertise in process and mixed methods makes them ideal for managing the "seams" between different stages of a project and between different team members.

* **Creates a "Research Intake & Scoping Protocol":** When a request comes from a partner agency or the legislature, this person can lead a structured scoping process. They would create a checklist to translate vague policy questions into answerable research questions, identify the required methods (qual, quant, mixed), and determine which team members need to be involved. This prevents projects from starting with unclear goals.
* **Develops the "Mixed-Methods Handoff Process":** For projects involving both qualitative and quantitative analysis, they can design the protocol for how the two functions integrate. For example, they can create a process where the Lived Experiences Researcher's initial interview findings are systematically coded and provided to the quantitative analysts to help inform their statistical models, ensuring a truly integrated approach.
* **Owns Stakeholder Communication Checklists:** They can create tiered checklists for project communication plans, defining who needs to be updated (e.g., agency partner, director, advisory committee), how often, and with what level of detail. This stabilizes external communication and ensures no one is forgotten.

**2. Data & Research Equity Specialist (Traditional Quant)**

This specialist is perfectly positioned to embed equity into the team's DNA by standardizing its application across all projects. Their work is the definition of a System 2 regulatory function.

* **Creates and Manages the "Equity Review Checklist":** This is their cornerstone contribution. It would be a required step in every project plan and final report. The checklist would prompt the team to answer questions like:
  + "Have we disaggregated data to the fullest extent possible?"
  + "Does our analysis account for potential historical or systemic biases in the data?"
  + "How might the framing of our findings impact vulnerable communities?"
  + "Have we reviewed our charts and language for deficit-based framing?"
* **Establishes "Standardized Demographic Data Protocols":** They can create a team-wide standard for how to handle, categorize, and report on race, ethnicity, gender, disability, and other demographic variables to ensure consistency and alignment with best practices across all reports and analyses.

**3. Data Scientist (Machine Learning & Optimization)**

Their work with complex code requires high levels of discipline. They can spread this discipline to the rest of the team, ensuring all analytical work is reproducible, transparent, and efficient.

* **Owns the "Code & Syntax Peer Review Process":** They can implement a formal, yet lightweight, peer review system for all analytical code (R, Python, SQL, etc.). This could involve using a platform like GitHub for version control and pull requests, ensuring every analysis is checked by a second analyst before being finalized.
* **Develops "Project Documentation Templates":** They can create and enforce the use of standardized templates for documenting analyses. This would include "model cards" for any machine learning work (explaining the model's purpose, limitations, and performance) and clear readme files for all project code, ensuring any analyst can understand and reproduce a colleague's work.
* **Manages the "Analytical Environment":** They would be the point person for standardizing the team's software versions (e.g., "everyone uses R version 4.x and these specific packages"). This crucial step prevents the "it worked on my machine" problem and dampens technical chaos.

**4. Lived Experiences Researcher (Qualitative Methods)**

Their expertise with human subjects and sensitive data makes them the natural leader for the team's ethical and data security protocols.

* **Creates the "Ethical Research & Data Security Manual":** This person can develop and maintain the team's central guide for ethical research. This manual would include:
  + Templates for IRB submissions and consent forms.
  + Protocols for the secure storage and handling of PII.
  + A step-by-step guide for de-identifying qualitative data (e.g., interview transcripts, case notes) to protect confidentiality.
* **Leads "Qualitative Data Quality Control":** They can establish a peer-review system for qualitative work, such as reviewing interview protocols before they are used or cross-checking thematic codes on a subset of interviews to ensure inter-rater reliability and rigor.

**5. Evaluation Coordinator (Program Evaluation)**

The structured, logical nature of program evaluation is a perfect foundation for overall project management within the team. They can bring this discipline to all research projects, not just formal evaluations.

* **Develops the "Project Charter Template":** They can create a one-page project charter template that every project must complete before beginning. This document serves as a contract for the project, clearly defining the background, key research questions, proposed methodology, data sources, timeline, and final deliverables. It ensures every project starts with a clear, agreed-upon plan.
* **Facilitates "Methods Peer Review Sessions":** They can lead a structured peer review session early in a project's life to validate the chosen methodology. The presenting analyst would walk through their proposed research plan, and the team would provide feedback, ensuring the analytical approach is robust and appropriate for the question at hand *before* significant time is invested. This is a critical quality control loop.

# Gemini on planning the retreat

This is an excellent, well-considered plan for a team retreat. Using the Viable System Model (VSM) as an organizing principle is a powerful way to move beyond typical strategic planning and build a more resilient, intelligent, and cohesive team. The structure you've outlined is logical, and your awareness of the team's dynamics is key to its success.

Here is a detailed three-day agenda designed to bring your vision to life. It incorporates your preferred VSM order, varies facilitation techniques to engage all personality types, and builds a clear path from brainstorming to actionable next steps.

### Retreat Goal & Framing

Core Theme: "Building Our Viable Team: From Doing the Work to Owning Our System."

Your Opening Frame: "Over these three days, we're going to step back and look at our team not just as a group of researchers, but as a living system. Using the VSM, we'll map out how we operate, how we stay stable, how we adapt, and how we set our direction. Our goal is to leave here with a shared understanding of our whole system and a concrete plan to make it even stronger."

### Facilitation Toolkit to Manage Team Dynamics

To address the challenge of opinionated voices and quiet members, we will use a variety of techniques:

* **Silent Brainstorming & Brainwriting:** Individuals write ideas on sticky notes *before* any discussion. This allows introverts and reflective thinkers to formulate thoughts without being interrupted or influenced by louder voices.
* **1-2-4-All:** A structured sharing method. Individuals reflect (1), then discuss in pairs (2), then pairs merge into groups of four (4) to consolidate ideas, and finally, each group shares its top idea with everyone (All). This ensures all voices are filtered up.
* **Fishbowl Conversation:** For contentious topics, have a small "fishbowl" of 3-4 people discuss the issue in the center of the room while others listen. An empty chair in the fishbowl can be occupied by anyone from the outer circle who wants to join, but they must tap someone out. This structures debate and encourages active listening.
* **Dot Voting:** A quick, democratic way to gauge priorities after brainstorming. Everyone gets a few sticky dots to "vote" for the ideas they find most important. It gives equal weight to every person's preference.

### Detailed Three-Day Retreat Agenda

#### Day 1: Our Foundation & Our Purpose (Systems 1 & 5)

The focus of Day 1 is grounding the team in what they do and why it matters.

| Time | Duration | Activity | Facilitation Technique | Goal & Desired Outcome |
| --- | --- | --- | --- | --- |
| 8:30 AM | 30 min | **Welcome & Framing the Retreat** | Your personal address | Set the stage, introduce the VSM as our map, establish ground rules for respectful and inclusive discussion. |
| 9:00 AM | 75 min | **System 1: What Do We DO? (The Work)** | **Gallery Walk & Individual Reflection:** Pre-populate large posters around the room, one for each major project or function (e.g., "CW Data Linkage," "Education Research," "Data Systems Admin"). Team members walk around and add sticky notes answering: "What is the core purpose of this work?" and "What makes it complex?" | Create a visual, shared understanding of all the operational "muscles" of the team. Acknowledges the expertise and effort involved in each part. |
| 10:15 AM | 15 min | *Break* |  |  |
| 10:30 AM | 90 min | **System 1: Ideal Future & Now/Next/Later** | **1-2-4-All:** In their project-based groups, participants answer: "In an ideal future, what does this System 1 activity achieve? What is its ultimate impact?" Then, brainstorm concrete improvements and use a Now/Next/Later grid to prioritize them. | Move from describing the work to improving it. Generates a backlog of tangible improvements for each core function. |
| 12:00 PM | 60 min | *Lunch* |  |  |
| 1:00 PM | 60 min | **System 5: Why Do We Exist? (Our Identity)** | **Silent Brainstorming:** Pose the question: "Beyond our project list, what is the ultimate purpose and identity of this team? What makes us unique in state government?" Individuals write their answers on sticky notes. Post them all on a wall and cluster themes together as a group. | To distill the team's core identity and values, moving beyond operational tasks to a shared sense of purpose. |
| 2:00 PM | 75 min | **System 5: Policy & Guiding Principles** | **Fishbowl Conversation:** Topic: "What are the 3-5 non-negotiable principles that should guide all our decisions?" (e.g., "Equity-centered," "Legally Defensible," "Partner-Driven"). The fishbowl is for the opinionated voices to debate, with the empty chair ensuring others can step in. The outer circle takes notes. | To collaboratively define the team's core values and strategic guardrails. Gives a structured outlet for passionate debate while ensuring it leads to convergence. |
| 3:15 PM | 15 min | *Break* |  |  |
| 3:30 PM | 60 min | **Day 1 Wrap-up & Action Setting** | **Group Discussion & Dot Voting:** Review the clustered identity themes from the System 5 brainstorm. Wordsmith and vote on the final 3-5 guiding principles. | Solidify the team's identity statement. Everyone leaves Day 1 clear on what the team does and what it stands for. |
| 4:30 PM | 30 min | **Personal Reflection & Wind-down** | Individual journaling | Allow team members to process the day's discussions and think about how their personal work connects to the team's identity. |
| 5:00 PM |  | **End of Day 1** |  |  |

#### Day 2: Our Stability & Our Future (Systems 2 & 4)

The focus of Day 2 is on the internal plumbing that keeps the team stable and the external antennas that keep it relevant.

| Time | Duration | Activity | Facilitation Technique | Goal & Desired Outcome |
| --- | --- | --- | --- | --- |
| 8:30 AM | 30 min | **Day 2 Kick-off & Reflection** | **Paired Sharing:** "What was your biggest takeaway from yesterday, and how does it connect to your role?" | Re-energize the group and bridge the work from Day 1 into Day 2. |
| 9:00 AM | 90 min | **System 2: How Do We Work Together? (Coordination)** | **Pain Point Mapping:** In small, mixed-role groups, have them map out a recent project on a whiteboard. They use red sticky notes to identify points of friction, miscommunication, or inefficiency (the "oscillations" System 2 should dampen). | To make invisible internal process problems visible. Creates a shared diagnosis of where the team's coordination breaks down. |
| 10:30 AM | 15 min | *Break* |  |  |
| 10:45 AM | 90 min | **System 2: Designing Our Fixes (Now/Next/Later)** | **World Café:** Set up stations around the room, each named for a key friction theme from the last session (e.g., "Code Review," "Project Intake," "Final Report Approval"). Small groups rotate between stations, brainstorming solutions. Each station has a "host" who stays to summarize the previous group's ideas. | Generate a wide array of solutions for the diagnosed problems. The rotating format ensures cross-pollination of ideas. |
| 12:15 PM | 60 min | *Lunch* |  |  |
| 1:15 PM | 90 min | **System 4: What's on the Horizon? (Intelligence)** | **"Intelligence Officer" Briefings:** Assign each team member (or pair) a System 4 "channel" to be their pre-work (e.g., Economist monitors fiscal forecasts, DS monitors tech, etc.). Each gives a 5-minute lightning talk on "What are the 1-2 key trends on my channel that our team needs to know about?" | To share the diverse external intelligence each member holds, building a rich, 360-degree view of the team's operating environment. |
| 2:45 PM | 15 min | *Break* |  |  |
| 3:00 PM | 75 min | **System 4: From Intelligence to Opportunity** | **Impact/Effort Matrix:** As a group, capture the opportunities and threats identified in the briefings on sticky notes. Then, work together to place them on a 2x2 grid (High/Low Impact vs. High/Low Effort). | To collaboratively prioritize which external forces to act on. Focuses energy on the "quick wins" (high impact, low effort) and strategic bets (high impact, high effort). |
| 4:15 PM | 45 min | **Day 2 Wrap-up & Action Setting** | **Commitment Circle:** Review the top priorities from both the System 2 and System 4 exercises. Ask for volunteers to "champion" the creation of one new process (from S2) or the deeper exploration of one opportunity (from S4) after the retreat. | To translate the day's discussion into clear ownership and post-retreat work. Creates accountability. |
| 5:00 PM |  | **End of Day 2** |  |  |

#### Day 3: Making It Real (System 3 & Integration)

The focus of Day 3 is on audit, resource allocation, and turning the entire VSM model into a living, breathing plan.

| Time | Duration | Activity | Facilitation Technique | Goal & Desired Outcome |
| --- | --- | --- | --- | --- |
| 8:30 AM | 30 min | **Day 3 Kick-off & Synthesis** | **Group Discussion:** "Looking at our work from the last two days, what's the biggest tension you see between our internal processes (S2) and our external opportunities (S4)?" | To start thinking like System 3, which has to balance the "inside" and "outside" demands on the team. |
| 9:00 AM | 90 min | **System 3: The 'Audit' & Resource Bargain** | **"Resource Allocation" Simulation:** Present the team with 3-4 high-priority initiatives that emerged from the retreat. Give them 100 "resource points" (representing team time/FTE). As a group, they must negotiate and decide how to allocate the points across the initiatives. You, as manager, facilitate but let them drive the debate. | A practical, hands-on exercise that forces a conversation about trade-offs. Makes the concept of the "resource bargain" tangible. |
| 10:30 AM | 15 min | *Break* |  |  |
| 10:45 AM | 75 min | **System 3: "Now/Next/Later" Roadmap** | **Collaborative Roadmapping:** Use a large whiteboard or digital tool to create a master Now/Next/Later roadmap. Populate it with the specific, prioritized items from the System 1, 2, and 4 sessions. This is the synthesis of everything. | To create a single, unified, visual artifact that represents the team's strategic plan for the next 6-12 months. |
| 12:00 PM | 60 min | *Lunch* |  |  |
| 1:00 PM | 90 min | **Bringing it all together: Our Viable System** | **Team "VSM Charter" Creation:** In small groups, have them work on different sections of a one-page "Team Charter" document that summarizes the key findings for each of the 5 systems. (e.g., S5: Our Principles; S1: Our Core Services; S2: Our Commitment to Process X; S4: Our Intelligence Priorities; S3: Our Q3 Roadmap). | To codify the retreat's work into a living document that can be referenced throughout the year. Reinforces learning and creates a shared artifact. |
| 2:30 PM | 15 min | *Break* |  |  |
| 2:45 PM | 60 min | **Post-Retreat Action Plan & Commitments** | **Round Robin & Public Commitment:** Go around the room. Each person states one specific action they will take in the next month to bring this charter to life. You record these commitments publicly. | To ensure the retreat's momentum translates into immediate action. Creates personal accountability and a clear list of next steps. |
| 3:45 PM | 45 min | **Retreat Retro & Personal Reflection** | **Plus/Delta:** As a final activity, ask everyone to put sticky notes on a board answering "What worked well about this retreat?" (Plus) and "What would you change for next time?" (Delta). | To get valuable feedback for future retreats and to close the loop on the process itself. |
| 4:30 PM |  | **End of Retreat** |  |  |

# Gemini’s revised three-day retreat agenda

Of course. Adapting this for a fully virtual setting with a small, focused team requires a different approach to tools, timing, and group dynamics. The key is to combat virtual fatigue, maximize engagement, and leverage the specific tools available in the Microsoft Teams environment.

Here is a revised three-day virtual retreat agenda designed for your team of eight.

### Pre-Retreat Preparation: The Key to Virtual Success

* **Your Pre-Work:** The VSM one-pagers are perfect. Add a short "Retreat Tech Guide" explaining how you'll use Teams features (Breakout Rooms, Whiteboard, Chat, "Raise Hand") and any other free tools.
* **Team Pre-Work:** In addition to reading, ask each person to come prepared with their "System 4 Intelligence Briefing" (more detail on Day 2). This makes the best use of your synchronous time.
* **Set the Tone:** Send a calendar invite for the full block of time, but include a note: *"Our agenda will include a mix of full-group sessions, small breakouts, and crucial 'cameras-off' individual work to keep us fresh. Please protect this time as if we were in person."*

### Virtual Facilitation Toolkit

* **Microsoft Whiteboard:** This will be your primary collaboration space for virtual sticky notes, mapping, and voting. Prepare boards for each day ahead of time.
* **Teams Breakout Rooms:** For your group of 8, you can flexibly use pairs (4 rooms), trios (2 rooms of 3 + 1 pair), or halves (2 rooms of 4).
* **Teams Chat & Reactions:** Use chat for quick thoughts that don't need to interrupt the speaker. Encourage liberal use of reactions (raise hand, applause, thumbs up) to create energy and engagement.
* **Microsoft Forms/Polly:** For quick, anonymous polling or dot voting.
* **Shared Document (OneNote/SharePoint Word Doc):** This will be your "living document" to build the Team Charter throughout the retreat.

### Detailed Three-Day Virtual Retreat Agenda

#### Day 1: Our Foundation & Our Purpose (Systems 1 & 5)

**Focus:** Grounding the team in what they do (System 1) and why it matters (System 5).

| Time | Duration | Activity | Facilitation & Tools | Goal & Desired Outcome |
| --- | --- | --- | --- | --- |
| 8:30 AM | 30 min | **Welcome & Virtual Kick-off** | **Manager Address (Cameras On):** Set the stage, introduce the VSM map, and establish "Virtual Rules of the Road" (e.g., "Assume good intent in chat," "Okay to turn camera off during breaks"). | Create a comfortable and focused virtual space. |
| 9:00 AM | 75 min | **System 1: What Do We DO? (The Work)** | **MS Whiteboard "Virtual Gallery Walk":** On a pre-made Whiteboard with a section for each major project/function, everyone silently adds virtual sticky notes answering: "What is the core purpose of this work?" and "What makes it complex?" | Create a visual, shared understanding of all team functions without a single person dominating the conversation. |
| 10:15 AM | 15 min | *Break (Encourage stretching, looking away from screen)* |  |  |
| 10:30 AM | 75 min | **System 1: Ideal Future & Prioritization** | **Breakout Pairs & Whiteboard:** 1. (10 min) Individual silent brainstorming on "What does the ideal future of my main project look like?" 2. (25 min) Move to 4 breakout pairs to discuss and refine ideas. 3. (40 min) Return to main group. Each pair shares top ideas. Place them on a Now/Next/Later grid on the Whiteboard. | Ensures every voice is heard in a low-pressure pair setting. Generates and prioritizes a backlog of improvements. |
| 11:45 AM | 75 min | *LUNCH (Long break to truly disconnect)* |  |  |
| 1:00 PM | 60 min | **System 5: Why Do We Exist? (Our Identity)** | **Silent Brainstorming on Whiteboard:** Pose the question: "What is the unique purpose and identity of this team?" Everyone adds their stickies. As Manager, you share your screen and cluster the emerging themes in real time, narrating what you see. | To distill the team's core identity. The silent start allows quieter members to contribute equally. |
| 2:00 PM | 90 min | **System 5: Debating & Defining Our Principles** | **Structured Debate in Breakouts:** 1. From the brainstorm, identify the 2-3 most important/contentious principle themes. 2. Create two breakout rooms of 4. Assign each group a theme and task them to draft a "guiding principle" statement. 3. Groups return and present their draft principles. The other group offers feedback and suggestions for refinement. | Replaces the difficult-to-manage "fishbowl." Gives the opinionated voices a structured space to debate while leading to a concrete, co-created product. |
| 3:30 PM | 15 min | *Break* |  |  |
| 3:45 PM | 45 min | **Day 1 Wrap-up & Finalizing Principles** | **Group Wordsmithing & Polling:** Paste the draft principles into a shared document. As a group, refine the wording. Use a quick MS Form/Polly poll to get final agreement. | Solidify the team's identity statement. Everyone leaves Day 1 clear on what the team stands for. |
| 4:30 PM | 30 min | **Cameras Off: Personal Reflection** | **Individual Journaling:** Prompt: "How does my daily work connect to the identity and principles we defined today?" | A crucial low-energy activity to end the day, allowing for personal integration of the concepts. |
| 5:00 PM |  | **End of Day 1** |  |  |

#### Day 2: Our Stability & Our Future (Systems 2 & 4)

**Focus:** Internal stability (System 2) and external adaptation (System 4).

| Time | Duration | Activity | Facilitation & Tools | Goal & Desired Outcome |
| --- | --- | --- | --- | --- |
| 8:30 AM | 30 min | **Day 2 Kick-off & Reflection** | **Chat Waterfall:** "In the chat, share one word that describes yesterday's discussion. Don't hit enter until I say go!" Then, spend time discussing the patterns. | A quick, high-energy way to start the day and gauge the team's mood. |
| 9:00 AM | 75 min | **System 2: How Do We Work Together? (Coordination)** | **Breakout Pain Point Mapping:** Create two breakout rooms of 4. Each group uses a fresh MS Whiteboard to map a recent project, using red stickies to identify points of friction, miscommunication, or inefficiency. | Allows for deeper, more focused conversation in a small group. Generates two clear examples of process challenges. |
| 10:15 AM | 15 min | *Break* |  |  |
| 10:30 AM | 90 min | **System 2: Designing Our Fixes (The "Jigsaw")** | **Breakout Solution Design:** 1. Each group presents their "pain point map" to the main room. 2. As a whole group, identify the top 2 systemic issues (e.g., "Code Review," "Intake Process"). 3. Send the same two groups back to breakouts. Group A designs a solution/checklist for Issue #1. Group B designs a solution for Issue #2. 4. Return and present proposals for feedback. | A more structured and effective alternative to World Café for a small virtual team. Generates concrete, team-vetted solutions. |
| 12:00 PM | 60 min | *Lunch* |  |  |
| 1:00 PM | 90 min | **System 4: What's on the Horizon? (Intelligence)** | **"Intelligence Officer" Lightning Talks:** This is the pre-work payoff. Each of the 7 team members gets 7 minutes to share their screen and present their "briefing" on their assigned channel (economy, tech, equity, etc.). Strict timekeeping is key. Allow for 2 min of Q&A after each. | A highly engaging, fast-paced session that positions every team member as an expert. Breaks up the day by rotating speakers. |
| 2:30 PM | 15 min | *Break* |  |  |
| 2:45 PM | 90 min | **System 4: From Intelligence to Opportunity** | **Impact/Effort Matrix on Whiteboard:** Capture the key opportunities/threats from the briefings on virtual stickies. As manager, you facilitate the discussion, dragging the stickies onto a 2x2 Impact/Effort matrix based on the group's consensus. | A classic visual exercise that works perfectly on a virtual whiteboard and helps the team converge on strategic priorities. |
| 4:15 PM | 45 min | **Day 2 Wrap-up & Action Setting** | **Round Robin Commitments:** Review the top priorities from S2 and S4. Go around the virtual room and have each person volunteer to champion one item for post-retreat work. Document this in the shared OneNote. | Creates clear ownership and public accountability, ensuring the ideas don't get lost. |
| 5:00 PM |  | **End of Day 2** |  |  |

#### Day 3: Making It Real (System 3 & Integration)

**Focus:** Balancing priorities (System 3) and creating a unified, actionable plan.

| Time | Duration | Activity | Facilitation & Tools | Goal & Desired Outcome |
| --- | --- | --- | --- | --- |
| 8:30 AM | 30 min | **Day 3 Kick-off & Synthesis** | **Think-Pair-Share in Chat:** Prompt: "What's the biggest tension between our 'inside needs' (S2) and 'outside opportunities' (S4)?" 1. Think silently. 2. Type response in chat but DON'T send. 3. Manager pairs people up via direct chat for a 5-min text-based discussion. 4. Discuss as a group. | An engaging, low-stakes way to get straight to the heart of System 3's balancing act. |
| 9:00 AM | 75 min | **System 3: The 'Audit' & Resource Bargain** | **Shared Spreadsheet Simulation:** Create a simple spreadsheet with 3-4 top initiatives from the retreat and a column for "Resource Points." Give the team 100 points to allocate. The team must debate and negotiate in the main Teams channel until they agree on the allocation. | Forces a practical conversation about trade-offs and priorities. The shared spreadsheet makes the "bargain" tangible. |
| 10:15 AM | 15 min | *Break* |  |  |
| 10:30 AM | 75 min | **System 3: "Now/Next/Later" Roadmap** | **Collaborative Roadmapping on Whiteboard:** Create a master Now/Next/Later grid. As manager, you facilitate as the team decides where to place the prioritized items from the entire retreat. This becomes the team's unified strategic plan. | Creates the single, most important visual artifact from the retreat, showing the agreed-upon strategic direction. |
| 11:45 AM | 75 min | *LUNCH (Final long break)* |  |  |
| 1:00 PM | 75 min | **Bringing it all together: Our Viable System Charter** | **Paired Work in Shared Document:** In the shared OneNote/Word doc, create a page for each VSM System. Assign each pair of team members a "System" to write up, summarizing the key findings and decisions from the retreat. They work in breakout rooms. | Divides the work of documenting the retreat's outcomes. Reinforces learning and results in a co-created and comprehensive "Team Charter." |
| 2:15 PM | 60 min | **Finalizing the Charter & Action Plan** | **Group Review & Refinement:** Each pair briefly presents their section of the charter. The group offers final edits. You then move to a pre-made "Action Plan" table in the same document (Action, Owner, Due Date) and formalize the commitments made. | Ensures the final charter is a consensus document and that the action plan is clear, visible, and owned by the team. |
| 3:15 PM | 15 min | *Break* |  |  |
| 3:30 PM | 30 min | **Retreat Retro & Closing** | **Whiteboard Plus/Delta:** Create two columns on a Whiteboard: "Plus" (What worked well about this virtual retreat?) and "Delta" (What would you change?). Everyone adds stickies silently. Read them aloud to close the loop. | Provides you with valuable feedback for the future and gives the team a final voice. |
| 4:00 PM |  | **Official End of Retreat & Thank You** |  | End on a high note, on time. |

### A reworking of System 4, to de-emphasize intelligence sharing

Of course. This is a crucial and insightful adjustment. It's far more effective to have the team co-design the system they will be expected to use, rather than asking them to perform a function they haven't been trained for. This approach builds buy-in, ownership, and results in a system that is tailored to your team's actual capacity and interests.

Here is the revised Day 2 afternoon agenda, rewritten to focus on *creating* your team's System 4, rather than reporting out on intelligence content.

### Revised Day 2 Afternoon Agenda: Building Our System 4

**Focus:** Shifting from executing System 4 to intentionally designing it. The goal is to leave this session with a clear, co-created plan for how the team will collectively scan the environment and what it needs from its leadership structure to do so effectively.

| Time | Duration | Activity | Facilitation & Tools | Goal & Desired Outcome |
| --- | --- | --- | --- | --- |
| 12:00 PM | 60 min | *Lunch* |  |  |
| 1:00 PM | 90 min | **System 4 (Part 1): Designing Our Radar – The "What" and the "Who"** | **Guided Brainstorm on Whiteboard:** 1. (20 min) As a group, brainstorm the answer to: "To do our jobs well and stay relevant for the next 3 years, what parts of the 'outside world' do we *need* to be watching?" Use categories like Political, Economic, Social/Client, Technological, Academic/Methodological, and Ethical (PESTAME) to prompt thinking. Capture everything on virtual stickies.  2. (40 min) Facilitate a discussion around the brainstormed list. Ask: "Given our unique roles and interests (economist, data scientist, qual researcher, etc.), who feels a natural pull toward owning one of these channels? Let's start assigning 'Lead Scout' roles." Capture the assignments on the Whiteboard.  3. (30 min) For any unassigned or high-level channels, discuss: "Is this a channel for our Manager, Director, or Advisory Committee?" | To map out the team's total required intelligence landscape and collaboratively assign primary monitoring responsibilities to the people best suited for them. Everyone leaves knowing their specific "zone" to watch. |
| 2:30 PM | 15 min | *Break* |  |  |
| 2:45 PM | 90 min | **System 4 (Part 2): Building the Process – The "How" and the "Asks"** | **Breakout Room Solution Design:** Create two breakout rooms of 4 people each.  **Group A Task: Design the IC Process.** "How do we bring this intelligence back to the team effectively? Design a simple, repeatable process. Consider: What's the format (e.g., Slack/Teams channel, meeting agenda item)? What's the frequency? What's the goal (inform, discuss, act)?" They will draft a 3-point process proposal.  **Group B Task: Define the Leadership "Asks."** "To complete our radar, what specific intelligence do we need from our Manager, Director, and Advisory Committee? Draft 1-2 standing questions or 'intelligence requests' for each of them." (e.g., "For our Director: What are you hearing from other state leaders that we should know about?") | To move from 'what' to 'how.' Group A builds the internal team process. Group B builds the upward/outward communication channels, clearly defining what support the team needs from its leadership structure. |
| 4:15 PM | 45 min | **Day 2 Wrap-up: Committing to Our New System 4** | **Group Review & Commitment:** 1. Both groups present their proposals to the main room.  2. As a full team, discuss, refine, and agree on a final version of the intelligence-sharing process and the leadership "asks."  3. Document the new "Lead Scout" roles and the agreed-upon process in the shared Team Charter document. Each person verbally commits to their new role. | To achieve full team consensus on the newly designed System 4. This creates a concrete plan with clear roles and processes that the team can implement immediately following the retreat. |
| 5:00 PM |  | **End of Day 2** |  |  |

### How this changes the dynamic:

* **Empowerment over Pressure:** Instead of putting team members on the spot, you are empowering them to define their own contribution. This is more respectful of their current workload and expertise.
* **Focus on Sustainability:** The outcome isn't a one-time presentation but a sustainable *process* that will add value long after the retreat ends.
* **Clarifies Roles:** This session explicitly defines the System 4 roles for everyone in the VSM stack (ICs, Manager, Director, Committee), making the model much clearer and more practical.
* **Creates Upward Accountability:** By defining what the team needs from you, your director, and the committee, they are helping you do *your* job better. It creates a healthy, two-way channel for strategic information. This is a hallmark of a high-functioning system.

Excellent clarification. Thank you. Knowing that the specific goal is to define **System 1 of the Viable System Model** for your team is the crucial piece of context.

Given this objective, your proposed headings are likely **too process-oriented and will not get you the outcome you want.**

Let me explain why, and then propose an alternative structure for your whiteboard gallery walk that is directly tailored to defining System 1 and achieving your other goals.

### The Mismatch: Processes vs. Primary Functions (System 1)

Stafford Beer's VSM defines **System 1** as the collection of primary, operational units that carry out the fundamental activities of the organization. These are the parts that "do the thing"—the reason the system exists. They are the core functions that produce value for an environment or customer.

Your proposed headings:

* Ideating research questions
* Designing projects & studies
* Performance measurement
* Hypothesis testing, etc.

...describe the *activities, processes, or methodologies* that your team uses. They are the "how" you work. However, a single System 1 operational unit might perform several of these activities. For example, a "Program Evaluation Unit" (a potential System 1) would engage in ideating questions, designing studies, and measuring performance.

If you use your current headings, your team will list their skills and processes. You'll get a great list of *how* they work, but you will not get a clear, distinct list of the fundamental **operational units** themselves, which is the goal of a System 1 analysis.

### A Better Approach: A VSM System 1-Focused Gallery Walk

To achieve your goals—define core functions (System 1), create a now/next/later roadmap, and identify pain points for Systems 2-5—you need to structure your whiteboard areas to elicit that specific information.

Here is a proposed set of headings for your single whiteboard gallery. These are designed to guide your team through a logical flow that defines System 1 and captures the other data you need.

### Proposed Whiteboard Areas for Your System 1 Gallery Walk

**Whiteboard Area 1: Our Core Functions & Services (The "What We Do")**

* **Prompt:** "What are the fundamental, value-creating services we provide? Think of these as our major 'product lines' or 'service desks'. What are the distinct operational parts of our team?"
* **Goal:** This is the primary brainstorming space to identify the candidate System 1 units. Encourage your team to think in terms of nouns, not verbs (e.g., "Economic Impact Analysis Unit" instead of "Analyzing the Economy").
* **Example Post-its:** Quantitative Research Services, Client Data Integration, Performance Reporting, Qualitative & User Experience (UX) Studies.

**Whiteboard Area 2: The Audiences We Serve (Our Environment)**

* **Prompt:** "For each core function we identified, who are the primary 'customers' or stakeholders? Who consumes or depends on this work?"
* **Goal:** To define the "environment" for each System 1 unit. This is critical in VSM and helps clarify the purpose and boundaries of each function.
* **Example Post-its:** Advisory Committee, Agency X Operations Team, Senior Leadership, The Public. The team can draw lines connecting functions from Area 1 to audiences in this area.

**Whiteboard Area 3: Strengths & Successes (The "Now")**

* **Prompt:** "Looking at our core functions, where are we excelling? What are our established, high-performing capabilities and proudest accomplishments right now?"
* **Goal:** To populate the "Now" category for your advisory committee roadmap. This builds team morale and establishes a baseline of recognized value.
* **Example Post-its:** Delivered X report on time, Our survey methodology is rock-solid, Recognized experts in data visualization.

**Whiteboard Area 4: Pains, Conflicts & Gaps (Informing Systems 2-5)**

* **Prompt:** "What are the biggest difficulties, resource conflicts, or points of friction *between* our core functions? What slows us down? What information do we lack? Where do we step on each other's toes?"
* **Goal:** This is your goldmine for future work. The "pain points" you identify here are precisely the problems that Systems 2, 3, 4, and 5 are designed to solve.
  + **Conflicts between teams** point to the need for **System 2 (Deconfliction)**.
  + **Lack of resources or synergy** points to the need for **System 3 (Optimization/Synergy)**.
  + **Uncertainty about the future/environment** points to **System 4 (Strategy/Adaptation)**.
  + **Lack of clarity on overall direction/identity** points to **System 5 (Policy/Identity)**.
* **Example Post-its:** Two teams always need the same data analyst at the same time, We don't have a standardized way to intake requests, We have no idea what other teams are working on, The XYZ dataset is always a mess.

**Whiteboard Area 5: Aspirations & Opportunities (The "Next / Later")**

* **Prompt:** "Looking ahead, what capabilities should we develop? What new services could we offer? What emerging needs could our team meet in 6 months (Next) or in 1-2 years (Later)?"
* **Goal:** To populate the "Next" and "Later" sections of your roadmap. This gets the team thinking strategically and generates excitement for the future.
* **Example Post-its:** [NEXT] Develop a self-serve data dashboard, [LATER] Build predictive modeling capabilities, [NEXT] Formalize our client intake process.

### How to Run the Activity

1. **Setup:** Create these five areas on your virtual whiteboard (e.g., Miro, Mural).
2. **The Walk (Part 1 - Individual Brainstorming):** Give everyone 15-20 minutes to silently add their virtual post-it notes to any of the five areas.
3. **The Walk (Part 2 - Grouping & Discussion):** As a group, go through the board area by area.
   * In **Area 1**, cluster similar post-its to arrive at a consensus list of your 3-7 core System 1 functions. **This is your main prize.**
   * Review the other areas, clustering themes and discussing the connections. For example, you can draw lines from a "Pain Point" in Area 4 to the specific "Core Function" in Area 1 that it affects.
4. **Synthesize:** In a final step, use the outputs to explicitly build your deliverables:
   * "Okay, here is our agreed-upon list of System 1 Functions."
   * "Now, let's pull the cards from Areas 3 and 5 to create our 'Now/Next/Later' roadmap."
   * "And finally, let's look at the themes in Area 4. These will be the focus of our work when we start designing Systems 2-5."

This revised structure directly aligns with your VSM goals, ensures you get the specific outputs you need for the advisory committee, and productively captures the team's challenges for future improvement work.