



PRESIDENT'S MANAGEMENT A G E N D A



Federal Data Strategy Data Innovation Event Playbook

FEBRUARY 2020

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Why Should You Host a Data Innovation Event?

A Data Innovation event is an opportunity for your organization to promote and strengthen its community around data-related efforts. This playbook provides examples and templates to help generate ideas for an event customized to meet your team's needs.

Goals

The goals of hosting a Data Innovation event may include:

- Sharing, collaborating, and learning about data efforts happening across your organization
- Promoting the Federal Data Strategy's practices for:
 - building a culture that values data and promotes public use
 - governing, managing, and protecting data
 - promoting efficient and appropriate data use

Expected Outcomes

Organizations can expect that hosting a Data Innovation event will:

- increase productivity and efficiencies in leveraging data tools
- raise levels of data-related awareness and sharing among peers
- nurture data-related innovation

Questions to Get You Started

As you plan a Data Innovation event, here are some questions to consider:

- What are the current government-wide and/or agency data priorities?
- Who are the key participants for this event and what do I want them to take away (learn) from the event?
- Does your agency have champions whose involvement may enhance participation in the event?
- Does the committee creating the event have the right skill and experience mix? (e.g., event planning, communication, graphics, knowledge about agency data needs)
- Do you have space to host an event or will you need to find external space?
- Is there a budget for the event?
- Are there external partners who can help with planning and/or offset some of the cost?
- Is there a way to give learning or CPE credits to increase participation and help staff members fulfill other organizational requirements?

Theme Inspiration

Focus and draw inspiration for your Data Innovation event from various data-related topics. Here are a few to spark your creativity:

- data security and cybersecurity
- training day with classes that staff can sign-up for in advance
- data solutions from within the agency
- external vendors/organizations demonstrating data solutions
- data incubator contest showcasing new ideas

Event Types

The remaining playbook focuses on three event size examples that are customizable to your group and needs.

Event Type 1: Small Team Offsite

Size: Up to 50 attendees

Event Run Time: 9:00 AM – 3:00 PM

Purpose: Deep dive on data-related efforts and topics

Event Type 2: Large Team Open House

Size: 50 – 100 attendees (varies throughout the day)

Event Run Time: 9:00 AM – 12:00 PM or 1:00 PM – 4:00 PM

Purpose: Informal showcase of data-related efforts and topics

Event Type 3: Agency-wide Data Innovation Showcase and Training

Size: Open to all staff (varies throughout the day and per training offering)

Event Run Time: Training offerings from 9:00 AM – 4:00 PM; Lobby displays 11:30 AM – 2:00 PM

Purpose: Showcase data-related efforts and topics outside of the immediate team and offer data-related training

Alternatives to Consider

If a large event isn't possible in the near-term, consider these:

Incorporate office-wide data education sessions at All Hands meetings. Example sessions can include data-related training needs, tool introductions, and/or inspirational presentations from across the agency on how data helped solve problems.

Host a series of brown bag sessions focused on data-related skills and tool introductions. Encourage staff to sign up to present and participate.

Event Type 1: Small Team Offsite

Overview

Number of Attendees	Up to 50
Event Run Time	9:00 AM – 3:00 PM
Host	Team leadership
Location	Offsite conference room
Estimated Level of Effort	0.25 – 0.5 FTE for 2 months
Estimated Total External Cost	\$39,500
External Partnership	Yes

Event Synopsis

Goals: The goal of this event is to create an opportunity for staff to deep dive into data-related efforts, as well as new data legislation, regulations, and guidance, and how it all applies to their work.

Communications: As this is a small team event, a ‘save the date’ email, and a calendar invite will likely replace the need for marketing materials to communicate the date to staff. Leadership support for this event communicates to staff the importance of taking an active role in leveraging data at the team level, including sharing the tools needed to take on that role.

Planning: This event is an all-day session with various components including subject matter experts as speakers and breakout sessions with facilitators. The core planning team should identify an external partner who can help develop an agenda, identify facilitators and guest speakers, determine the flow of the workshop and breakout sessions, as well as handle logistics. A partnership could potentially incur external costs, but also enhance the event’s overall effectiveness.

Tips & Tricks

Create a repository where the team can go to reference event information, presentations, and handouts before and after the event.

Survey the team about session topics before planning starts to help create investment in success.

Estimated Level of Effort

	# of Staff	Time Spent Weekly	Duration
Core Planning Team	2	3.5 hours	2 months
Additional Support Staff	external partner supplements Core Planning Team		

Estimated Total External Cost

Item	Cost
Scoping and Planning Support	\$20,000.00
Logistics Support	\$7,000.00
Facilitators (8)	\$12,000.00
Speaker Fees	<u>\$500.00</u>
Total	\$39,500.00

Sample Timeline

Includes pre-planning activities, marketing/promotion, the event itself, and follow-up activities including thank you's and materials distribution.

2 months prior to event

- Identify external partnership
- Define the goals of the offsite, agree on roles and responsibilities, and gather key information
- Locate and reserve conference rooms
- Set event date
- Identify speakers and facilitators
- Create invite list
- Send 'Save the Date' email

1 month prior to event

- Send event invite
- Confirm speakers and facilitators
- Draft agenda
- Draft facilitation guide
- Set up logistics (security, on site lunch options, etc.)
- Create handouts/materials

1 week prior to event

- Finalize agenda
- Finalize facilitation guide
- Print handouts/materials
- Confirm logistics and day-of set up

Day of event

- Manage all logistics for the day: venue, registration, supplies, AV, and slides
- Manage timing to keep sessions on schedule
- "Emcee" the event
- Facilitate breakout sessions and any group activities
- Take notes for all sessions

1 week post event

- Send thank you emails to the external partners, facilitators, speakers, and support staff
- Organize all session notes and send to attendees with digital copies of handouts/materials
- Debrief event including lessons learned
- Schedule a follow-up meeting or conference call to plan work related to identified action items

Sample Checklist

Materials and considerations when planning an event of this type and size.

Pre-planning

- External partnership
- Weekly meeting with external partners

Facilities

- Large conference room
- Small breakout session rooms

Invitation

- 'Save the Date' email
- Calendar Invitation

Materials

- Agenda
- Posters
- Presentations
- Handouts
- Tent card/name tags
- Pens, paper, markers

Equipment

- Chairs
- Tables
- Projector
- Microphones
- Easels

Misc. Logistics

- Facilitators
- Note takers
- Catering options

Follow Up

- Thank You emails
- Notes and handouts email

Sample Agenda

For inspiration and consideration of the types of activities to include.

Time	Event
8:30 – 9:00 AM	Registration
9:00 – 9:20 AM	Welcome & Goals
9:20 – 9:40 AM	Keynote Speaker
9:40 – 9:50 AM	Presentation: Evidence Act
9:50 – 10:00 AM	Presentation: Federal Data Strategy
10:00 – 10:15 AM	Combined Q&A Session
10:15 – 10:30 AM	Break
10:30 – 11:15 AM	Session 1: Alignment with the Federal Data Strategy and Public Use
11:15 – 12:00 PM	Session 2: Impact of the Implementation of the Evidence Act
12:00 – 1:00 PM	Lunch Break
1:00 – 1:45 PM	Session 3: Evaluation of Data Governance Practices
1:45 – 2:30 PM	Session 4: Capacity, Leadership, and Resources for Implementation
2:30– 2:45 PM	Break
2:45 – 2:55 PM	Presentation of Highlights from Offsite
2:55 – 3:00 PM	Closing Remarks & Next Steps
3:00 PM	Adjourn for Optional Networking and Social Hour

Event Type 2: Large Team Open House

Overview

Number of Attendees	50 - 100 (varies throughout the day)
Event Run Time	9:00 AM – 12:00 PM or 1:00 PM – 4:00 PM
Host(s)	Team leadership
Location	One or two floors of the office, including all conference rooms
Estimated Level of Effort	1.5 - 2 FTE for 3 months + bi-weekly steering committee meetings
Estimated Total External Cost	No cost
External Partnership	None needed

Event Synopsis

Goals: The goals of this event include sharing information about data-related activities in process across the organization, encouraging staff to learn about projects outside their daily work, and generating buzz across the organization.

Communications: Send a ‘save the date’ email and a calendar invite, and post marketing flyers to build awareness. Take advantage of other ways your organization communicates such as an internal newsletter, intranet site, or director’s blog.

Planning: This is a less-formal event hosted and run by the organization in their office space, spanning one or two floors. The team will set up informational posters, exhibit booths, and demos in the open spaces and in the reserved conference rooms. Staff will have the opportunity to sign up and showcase their data innovations and efforts, as well as give presentations or demos explaining their work.

Tips & Tricks

Print and distribute a map of the booth and demo locations – include times for presentations.

Create a standard template for presenters to fill out as handouts for their booth.

Survey attendees to discover which presentations generated the most interest and plan follow-up brown bag sessions.

Pair senior staff with junior staff at booths to encourage cross collaboration.

Estimated Level of Effort

	# of Staff	Time Spent Weekly	Duration
Core Planning Team	10	8 hours	3 months
Additional Support Staff	<ul style="list-style-type: none"> • Steering Committee representing all parts of the organization (12 - 15 staff) • Participating staff to run booths, demos, etc. • IT Specialists to set up A/V for demos • Team to design posters, handouts, etc. (1-2 staff) 		

Sample Timeline

Includes pre-planning activities, marketing/promotion, the event itself, and follow-up activities including thank you's and materials distribution.

3 months prior to event

- Host kick-off meeting
- Set event date
- Reserve all conference rooms
- Establish bi-weekly planning meetings
- Identify potential booth, demo, and/or presentation topics

2 months prior to event

- Draft conference room layout for booths
- Create event SharePoint site
- Create invite list
- Send 'Save the Date' email

1 month prior to event

- Design communications materials
- Design presenter handout template
- Send event invite
- Schedule presenters meeting
- Develop attendee survey

2 weeks prior to event

- Send communications via newsletters, intranet, etc.
- Confirm participating staff for booths, demos, etc.
- Collect presenter information via handout template

1 week prior to event

- Print handouts/materials
- Host presenters meeting
- Confirm logistics and day-of set up

Day before event

- Set up booths and displays

Day of event

- Manage all logistics for the day: supplies, AV, etc.

1 week post event

- Send thank you emails to presenters and support staff
- Debrief event including lessons learned
- Analyze and summarize attendee survey results
- Write and post follow-up articles in newsletter, on intranet, etc.
- Schedule a follow-up meeting or conference call to plan work related to identified action items

Sample Checklist

Materials and considerations when planning an event of this type and size.

Pre-Planning

- Establish Steering Committee

Facilities

- Space to set up posters/create booths
- Room reservations
- Sign language interpreting services

Invitation

- Calendar invite to staff

Materials

- Floor Map
- Presentations
- Handouts

Booths

- Booth volunteers
- Laptops, TVs, & other equipment for booths
- Easels as needed for posters/signs for booths

Marketing & Promotion

- Posters
- SharePoint Site

Sample Agenda

For inspiration and consideration of the types of activities to include.

Booth #	Booth/Exhibit Name	Room #
1	Automated Data Collector for Compliance Checking	3
2	Division Director Dashboards	2
3	ENG Mind Map	3
4	Mac Super User - Tips & Tricks	2
5	Panel Solver	1
6	Program Director Dashboards	2
7	Program Director Proposal Panel Portfolio Organizer	3
8	RA Templates for RoboRA	1
9	RoboRA - for Administrative Professionals	1
10	RoboRA - for Program Directors	1

Event Type 3: Agency-wide Data Innovation Showcase and Training

Overview

Number of Attendees	Open to all staff (<i>varies throughout the day and per training offering</i>)
Event Run Time	Training classes 9:00 AM – 4:00 PM Lobby displays 11:30 AM – 2:00 PM
Host(s)	Data office or team
Location	Agency lobby/atrium and conference rooms for trainings
Estimated Level of Effort	1 – 1.25 FTE for 6 months + bi-weekly steering committee meetings
Estimated Total External Cost	No cost - if collaborating with an external partner
External Partnership	Yes (e.g., Federal Business Council)

Event Synopsis

Goals: The goal of this event is to showcase data related topics outside of the immediate team and offer data related trainings.

Communications: Recommend email newsletter (reminders) and save the date, as well as marketing materials. Since this is larger event, it is recommended that the agency partner with an external organization. The external partner will provide marketing and promotional materials and in exchange data related vendors will set up tables in the lobby.

Planning: The planning team will partner with a private company that specializes in partnering with government groups to put on these types of events. In addition to the vendor tables the Data Office or Team will set up tables and booths displaying their data projects and efforts. Along with the displays in the lobby, the team can work with HR to offer data related trainings that staff can count towards attendee training goals.

Tips & Tricks:

Create a “carnival” experience with games and giveaways – make it fun!

Initiate the private partnership about 3 months out from the event.

Estimated Level of Effort

	# of Staff	Time Spent Weekly	Duration
Core Planning Team	8	6 hours	6 months
Additional Support Staff	<ul style="list-style-type: none"> Steering Committee representing all parts of the organization Human Resources/Training Team Presenters for trainings Participating staff to run booths, demos, etc. IT Specialists to set up screens for demos 		

Sample Timeline

Includes pre-planning activities, marketing/promotion, the event itself, and follow-up activities including thank you's and materials distribution.

6 months prior to event

- Host Kick-off Meeting
- Set event date
- Identify potential training topics

3 months prior to event

- Establish bi-weekly planning meetings
- Initiate private partnership
- Work with private partnership to identify data-related vendors
- Reserve conference rooms and lobby area
- Reach out to HR to establish training credits
- Confirm trainings and presenters
- Design and write marketing materials and communications
- Put out a call for volunteers to help with logistics

1 month prior to event

- Set up intranet page with event details
- Begin distributing marketing materials and communications via newsletters, intranet, etc.
- Gather agendas and course descriptions from presenters
- Develop attendee survey

2 weeks prior to event

- Confirm participating staff for booths, demos, etc.
- Collect presenter information via handout template
- Create 'day of' schedule for volunteers

1 week prior to event

- Hold a training session for volunteers
- Finalize training agenda

Day before event

- Confirm 'day of' volunteers
- Gather all materials

Day of event

- Set up training rooms
- Set up tables in the lobby

1 week post event

- Send thank you emails to presenters, exhibitors, partners, and support staff
- Debrief event including lessons learned
- Analyze and summarize attendee survey results
- Write and post follow-up articles in newsletter, on intranet, etc.
- Schedule a follow-up meeting or conference call to plan work related to identified action items

Sample Checklist

Materials and considerations when planning an event of this type and size.

Pre-Planning

- Steering Committee
- Private partnership

Facilities

- Space to set up posters/create booths
- Room reservations

Training

- Topics
- Course descriptions for credit
- Course information to HR
- Training presentations
- Copies of presentations/handouts for training as needed
- Sign language interpreting services for training sessions
- Roster from HR for each class

Vendors/Booths

- Data related vendors
- Booth volunteers
- Tables and skirting (if needed) for booths
- Power strips
- Laptops, TVs, & other equipment for booths
- Easels as needed for posters/signs for booths
- Giveaways

Marketing & Promotion

- Agenda
- Posters
- Event Intranet Page

Sample Agenda

For inspiration and consideration of the types of activities to include.

Time	Event	Location
9:00 AM – 3:30 PM	Training	
9:00 – 10:00	Data Stewardship – Updating Policies and PPM Chapters Training	Training Room 1
10:00 – 11:00	Open Government and Privacy	Training Room 1
11:00 – 12:00	Privacy Impact Assessment Training	Training Room 1
11:00 AM – 2:00 PM	Booths and Activities	Lobby/Atrium
12:30 – 1:30	Paperwork Reduction Act (PRA) E-Tracking	Training Room 2
1:30 – 2:30	System of Records Notice (SORN) Training	Training Room 2
2:30 – 3:30	Paperwork Reduction Act (PRA) E-Tracking System Training for PRA Reviewers/Approvers	Training Room 2

Appendix 1: Resources

Websites

[Strategy.data.gov](https://strategy.data.gov) - Visit the Federal Data Strategy website for more information about the Strategy, the 2020 Action Plan, and individual practices, principles, and actions.

[Resources.data.gov](https://resources.data.gov) - Explore the Resources website for more information on tools, playbooks, and other resources available to help you implement the Federal Data Strategy in your agency.

Points of Contact

Keep a list here of people who may be able to help you plan a Data Innovation event.

Name	Email Address	Can Assist With

Appendix 2: Sample Checklist – General

Pre-Planning

- Date and time: _____
- Location: _____
- Event type/setup:
 - In person: _____
 - Skype/Webinar: _____
 - Panel: _____
 - Presentation: _____
 - Booth setup: _____

Finance

- Space/reservation: _____
- Food/drink: _____
- Printing (handouts, agendas, etc.): _____
- Promotional Items (pens, stickers, etc.): _____

Facilities Considerations

- Space reservation: _____
- Security forms: _____
- Special security considerations: _____
- Non-badged (HSPD 12) attendees/speakers/event staff: _____
- Non-registered attendees: _____
- Foreign nationals: _____
- Day-of POCs: _____
- Security: _____
- AV/Teleconference: _____
- Room Setup: _____

Program

- Topic List: _____
- Confirmed speakers: _____
- Agenda: _____
- Handouts: _____

Equipment

- Technology:
 - Screen/presentation: _____
 - Teleconference: _____
 - Webinar/camera: _____
 - Whiteboard/easels: _____
 - Other: _____

- Chairs:
 - Quantity: _____
 - Location/layout: _____

- Tables:
 - Quantity: _____
 - Location/Layout: _____

Invitation

- Guest list: _____
- Invitation type
 - Email: _____
 - Eventbrite: _____
 - Other: _____
- Save the date: _____

Marketing & Promotion

- Posters/Fliers: _____
- Tweets: _____
- Newsletters: _____
- Emails: _____
- Other: _____

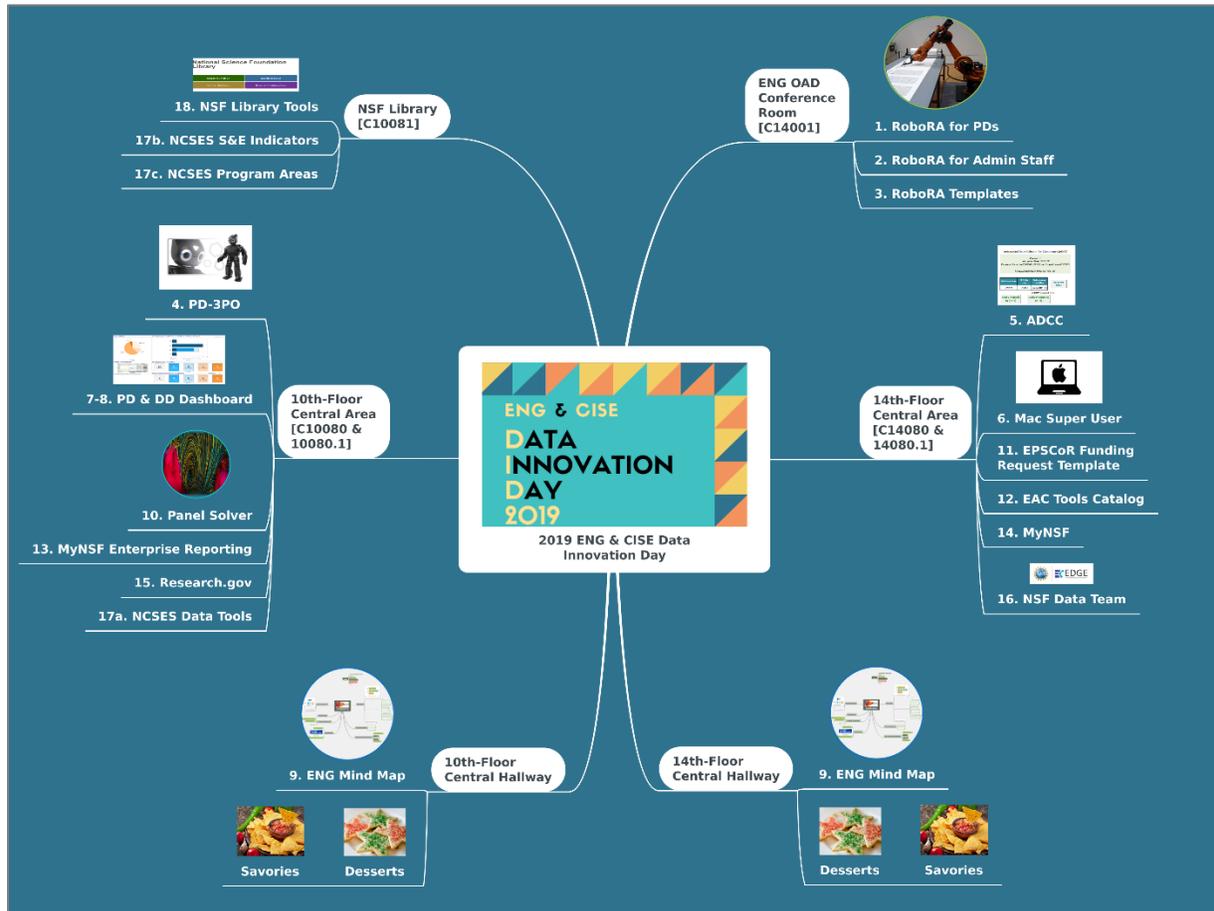
Appendix 3: Sample Marketing and Communications

Samples for inspiration and consideration

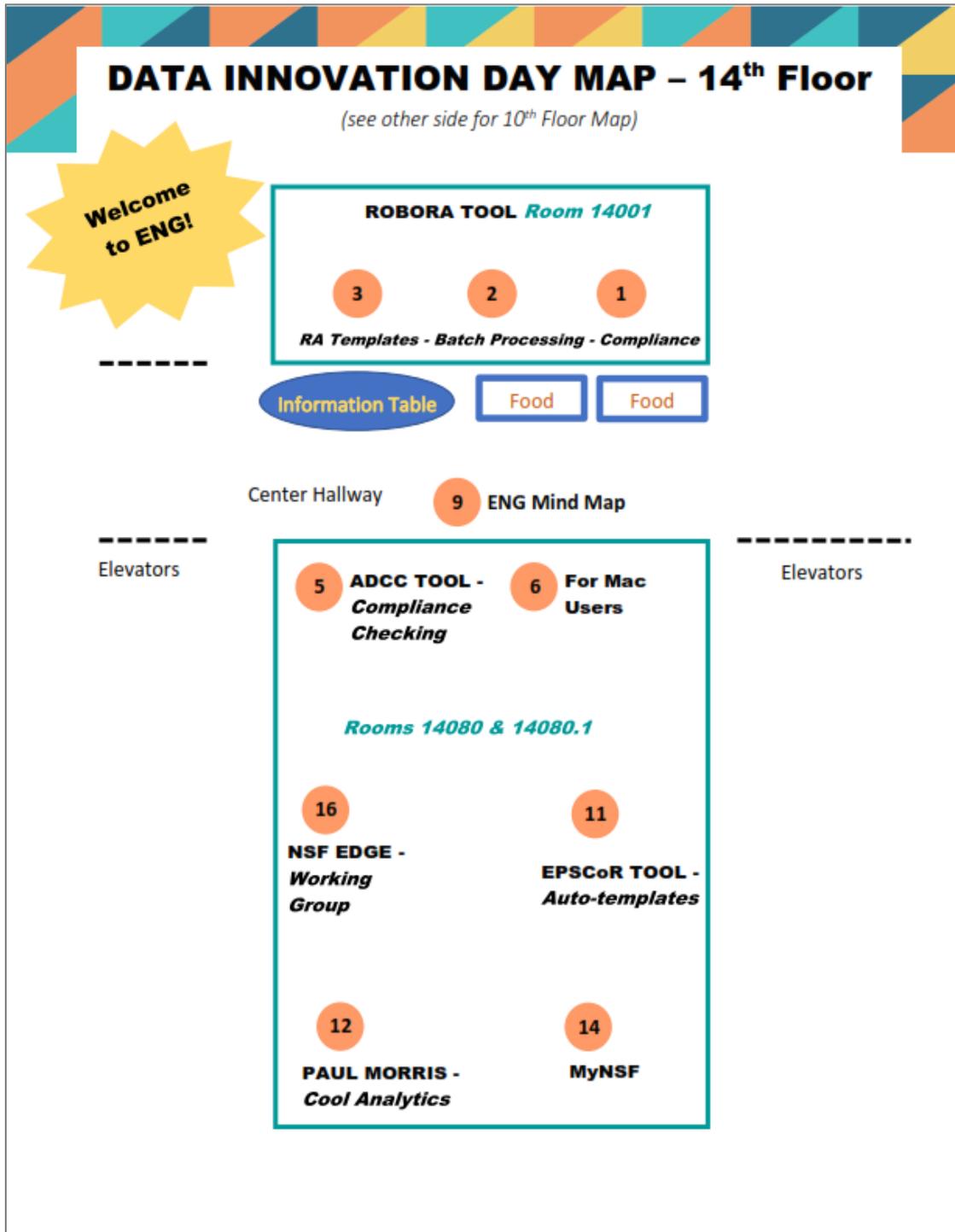
U.S. Census Data Protection & Privacy Day Agenda/Flier

TIME	TRAINING SESSIONS	ROOM
10:00 am - 12:00 pm	<p>Privacy in Small Bites*</p> <p>(For Headquarters Managers & Supervisors)</p> <p><i>Presenter: Byron Crenshaw Chief, Privacy Compliance Branch, PCO</i></p>	Conf Room 2-3
10:00 - 11:00 am	<p>Privacy Act Requests: Processing and Conditions of Disclosure</p> <p>(Open for All Headquarters Employees)</p> <p><i>Presenter: Vernon Curry Chief, FOIA and Privacy Act Office</i></p>	Conf Room 4
2:00 - 3:00 pm	<p>Privacy and Open Government</p> <p>(Open for All Headquarters Employees)</p> <p><i>Presenter, Jennifer Goode Program Manager, Open Government Program, PCO</i></p>	Conf Room 4

National Science Foundation ENG & CISE Data Innovation Day Event Map



National Science Foundation ENG & CISE Data Innovation Day Floor Map



National Science Foundation ENG & CISE Data Innovation Day Poster

ENG & CISE
DATA INNOVATION DAY 2019

Proposal Processes Made Easy

DECEMBER 3, 2019
11 A.M. - 1 P.M.
10TH & 14TH FLOORS

Ever wonder how to...

- Automate an EPSCoR co-funding request?
- Make compliance-checking easier & faster?
- Get information for a panel automatically?
- Identify diverse panelists easier?
- Quickly check on Program and Division pending proposal actions?

Demonstrations & tutorials will be available on:

- RoboRA
- MyNSF
- ADCC
- PD-3PO
- Panel Solver
- Research.gov
- ENG Mind Map
- Pointers for Mac Super Users
- PD & DD Dashboard
- CDO & NSF EDGE Group
- NSF Library, research tool-set
- EPSCOR Funding request templates
- S&E indicators, surveys & data tools
- EAC Tools Catalog

WE HOPE TO SEE YOU THERE!

National Science Foundation ENG & CISE Data Innovation Day Agenda Handout

ENG CISE 2019 Data Innovation Day		Proposal Processing made Easy... and much more!		December 3, 2019 NSF 10th and 14th floors	
Booth #	Booth Name	Room #	Presenter	Dir/Div	
1	RoboRA - for Program Directors	C14001	Jesús Soriano Alejandro Suárez	ENG/IIP CISE/OAC	
2	RoboRA - for Administrative Professionals	C14001	Jasmine Smith Sharon Glivens	ENG/CBET CISE/CNS	
3	RA Templates for RoboRA	C14001	Wendy Nilsen Miki Templeton	CISE/IIS ENG/IIP	
4	PD-3PO (Program Director's Proposal Panel Portfolio Organizer) for proposal processing and much more	C10080/C10080.1	Kevin Webster Almadena Chtchelkanova	ENG/CMMI CISE/CCF	
5	ADCC Automated Data Collector for Compliance Checking	C14080/C14080.1	Terria Davis Joneka Thompson	ENG/CMMI CISE/CCF	
6	Mac Super User Tips and Tricks	C14080/C14080.1	Shannon Beck Tim Patten	CISE/CNS ENG/CBET	
7 & 8	PD & DD Dashboard Program Director & Division Director -Dashboards	C10080/C10080.1	Kerstin Mukerji Richard Nash	ENG/IIP ENG/ECCS	
9	ENG Mind Map an expandable, searchable map of tools, websites, best practices, and other resources across NSF	Lobby - C10075 & C14075	Amelia Greer Amy Walton Miriam Scheiber Gabriela Niño de Guzmán	ENG/EEC CISE/OAC ENG/CMMI ENG/OAD	
10	Panel Solver for assembling panels	C10080/C10080.1	Paul Lane Indrajit Ray	ENG/ECCS CISE/CNS	