Proudly Serving

Public service with and for the people

Contents

Initiation

Purpose

This is for everyone who:

- Serves the people
- Takes pride in their part
- Does the hard work to deliver it
- Believes there is always a better way

Call to action

If you work in public service — and in one way or another, we all do — your civic responsibilities include a commitment to:

- Agility
- Humility
- Resiliency
- Openness
- Inclusiveness
- Responsiveness

Delivering services is not just the job of government officials. We must all commit to a new standard that meets changing needs and expectations.

Together, let’s serve for, by, and with all people.

Swear yourself in

Before getting started, swear yourself in.

Take the Proudly Serving pledge:

> I, [YOUR NAME], earnestly swear that I will proudly serve with a new standard of public service.
>
> Every day, I will do my part to serve for, by, and with all people.
>
> I will hold myself and others accountable to this responsibility.

Congratulations on taking the first step.

Let’s start proudly serving.

Contemplation

Reframe public service

By Luke Fretwell

Overview

The pillars of public service include government, non-profit, business, media, academia, and the public. By reframing our context for what it means to serve, we shift power dynamics from “the government” to “we are all public servants.” This empowers everyone to have a shared sense of responsibility, accountability, and unity.

The problem

Our traditional image of public service is the taxpayer-funded civil servant who administers the work of government. The power dynamics put government at the top and the people at the bottom. Politicians and bureaucrats are public servants and everyone else, to varying degrees, are observers.

Engagement approaches and mechanisms are generally passive, performative, or non-existent, and lines of communication are limited or one-way.

The solution

Anyone who takes part in building and nurturing their community is a public servant and does public service. By actively respecting, recognizing, and honoring that we are all equal civic partners, we can create a better civil society with seamless collaboration, open communications, community pride and a strong sense of individual and collective empowerment.

Context

Civil society is made up of a variety of actors, and each has an important role to play in its operational, fiscal, and social health. Their collective contributions must be seen not as problems to manage, but as opportunities and solutions that support and scale civic impact.

Reframing the context of public service empowers everyone to feel like they're part of something bigger than themselves and encourages others to take this responsibility seriously. It discards the "us vs. them" mindset that has a negative impact on a well-functioning civil society.

Pillars of public service

We tend to refer to parts of civil society in monolithic, disconnected "the" terms. "The government." "The vendors." "The activists." "The press." "The public."

At times, perhaps more often than not, they're referred to derisively, as if they're an inconvenience that must be tolerated or placated. Or they're used opportunistically, only when it's convenient or necessary.

But each of these parts is an important pillar of the civic ecosystem, playing a valuable role in its well-being and growth.

The pillars of public service include:

- Government
- Non-profit
- Business
- Media
- Academia
- Community at large

We’re better together

If we consider all of these as pillars of public service, the outcomes outweigh the tradeoffs. While the process may take longer, better outcomes can prevail. Genuinely and intentionally including everyone is the cornerstone of true civics.

Whether formally or informally, take the opportunity to authentically acknowledge and appreciate the players in each pillar. At times, this may be difficult but, ultimately, recognizing and honoring one another encourages a virtuous civic cycle of earnest inclusivity and togetherness.

We’re all public servants

Everyone, in some form or another, is of service to others.

Government ensures our infrastructure is maintained or services are delivered. Non-profit organizations give support where others can’t or don’t. Businesses employ people, provide products and services, and create revenue that financially feeds into other pillars. The media informs us and, at times, exposes wrongdoings, keeping others accountable. Schools educate and foster intellectual growth that builds leaders, experts, and thoughtful decision-making. Community members vote, volunteer, engage in public forums, and pay taxes.

We’re all public servants. We all do public service.

Mantras

- We’re all public servants
- Everyone is a public servant

Checklist

- [ ] Educate staff on the pillars of public service.

- [ ] Brainstorm and incorporate ways to remind staff.
- [ ] Share pillars of public service adoption with the public.

Questions to ask

- Are there others who could be involved and help us achieve our goals?
- Are we openly sharing all aspects of government work?
- Does everything we do have a collaborative component?
- Do we regularly recognize and honor all pillars for their service?

Learn more

- Good Citizens, Thich Nhat Hanh[1]

Default to open

By Luke Fretwell

Overview

Openness is a mindset and culture. It creates opportunities for exponential civic innovation. By embracing the values of collaboration, participation, and transparency, we instill trust while fostering better and faster solutions to problems both small and large.

The problem

When we isolate our processes and decision-making from the public, we limit the opportunity to truly create government with, for, and by the people. Opaqueness leads to ambivalence and mistrust. Taking an insular approach to service prevents us from leveraging the collective wisdom and energy of the people we serve.

The solution

Adopt an “open by default” culture that publicly shares information and processes — internally and externally — and actively solicits participation. By creating mechanisms that encourage government and the public to engage early and often, we create opportunities for increased participation and collaboration. This builds trust and a sense of betterment for the entire community.

Context

An ethos of openness empowers organizations — public and private — to be more adaptive and responsive to the people they serve.

The policy of open

The White House began using the term “open government” in January 2009, when President Barack Obama signed the “Memorandum on Transparency and Open Government,” which called for increased public sector transparency, participation, and collaboration:

> Transparency promotes accountability by providing the public with information about what the Government is doing. Participation allows members of the public to contribute ideas and expertise so that their government can make policies with the benefit of information that is widely dispersed in society. Collaboration improves the effectiveness of Government by encouraging partnerships and cooperation within the Federal Government, across levels of government, and between the Government and private institutions.

President Obama’s Open Government Initiative ushered in an era of modernization in technology and operations, including open source software, open data, and innovative engagement methods, such as public challenges.

Technologists and designers have been early adopters to a culture of openness in government. This mindset is emphasized in play 13 — “Default to open” — of the U.S. Digital Services Playbook:

> When we collaborate in the open and publish our data publicly, we can improve Government together. By building services more openly and publishing open data, we simplify the public’s access to government services and information, allow the public to contribute easily, and enable reuse by entrepreneurs, nonprofits, other agencies, and the public.

The United Kingdom (UK) government GOV.UK team is another example of government actively embracing openness, including a public roadmap that shows “what we’re working on and planning to do.”

From its official design principles:

> We should share what we're doing whenever we can. With colleagues, with users, with the world. Share code, share designs, share ideas, share intentions, share failures. The more eyes there are on a service the better it gets — howlers are spotted, better alternatives are pointed out, the bar is raised.

The open organization

The Open Organization Maturity Model, a companion piece to the book "Open Organization: Igniting Passion and Performance," offers a framework organizations can use to become more inclusive. The five concepts that constitute this framework are central to the values and mission of public service:

- Transparency
- Inclusivity
- Adaptability
- Collaboration
- Community

"An 'open organization' — which I define as an organization that engages participative communities both inside and out — responds to opportunities more quickly, has access to resources and talent outside the organization, and inspires, motivates, and empowers people at all levels to act with accountability," writes former Red Hat CEO and IBM President Jim Whitehurst in "Open Organization."

"The beauty of an open organization is that it's not about pedaling harder, but about tapping into new sources of power both inside and outside to keep pace with all the fast-moving changes in your environment."

Open makes it better

Generally speaking, open by default is just the right thing to do. As the GOV.UK team mantra says, "Make things open: it makes things better."

Mantras

- Default to open
- Open by default

Checklist

- [ ] Publish an "Open government" page and statement to your website.
- [ ] Establish standing mechanisms for public input.
- [ ] Ensure there are multiple ways to engage with events, issues, projects.
- [ ] Share processes and progress publicly, early, and often.
- [ ] Publish timelines and roadmaps for initiatives and projects.
- [ ] Provide as much information as possible in publicly-accessible formats.

Questions to ask

- How are we collecting public feedback on meetings, issues, and projects?
- What information do we make available to the public?
- Is this information easy to find and access at any time?
- How are we documenting what government information is available?
- What government-produced work can we make available to the public for reuse?

Learn more

- Open civic organizations, GovFresh[2]
- Default to open, U.S. Digital Services Playbook[3]
- The Open Organization: Igniting Passion and Performance, Jim Whitehurst[4]
- Open Government Directive, The White House[5]
- Make things open: it makes things better, GOV.UK[6]
- The Open Organization Maturity Model, Opensource.com[7]

Get digital

By Artem Khomishen

Overview

Digital channels — websites, apps, chatbots, social media, texts, email newsletters — are standard when it comes to government services and information. But just having an online presence isn't enough to qualify as "going digital."

Be intentional and build government digital services that truly focus on the needs of the people.

The problem

Despite widespread use, many government digital practices do not meet the needs of the people they serve. Digital services are often poorly managed and hard to use. Users face fragmented customer experiences that can erode their trust in government's ability to adapt and improve.

The solution

Digital services that work well require a digital-first product mindset and agile approaches to technology procurement and delivery. Transparency and collaboration are the default way of operating internally and externally.

To achieve a digital experience that is easy to use, accessible to everyone, effective and efficient to manage, governments need to:

- Identify relevant and high-demand services
- Improve internal processes for better delivery
- Digitize services and make them easy to use

Context

Digital is the primary point of engagement in everything we do. Governments must prioritize this to meet the needs of the public.

Going digital often means transforming analog or legacy processes into new formats and systems. Simply digitizing a form that was created decades ago does not equal going digital.

Service implementers also need to make sure services and processes are easy to use and address the needs of the public. Going digital means leveraging data, modern technology, user-centered design, and agile processes to deliver better digital services.

Governments use various digital channels to serve the public: websites, apps, emails, social media, chatbots, and more. They also need to think creatively when coming up with digital solutions and not be tied to what already exists.

Digital in government

Government now recognizes the importance of digital transformation. Initiatives like the Digital Service Playbook modeled by the U.S. Digital Service provides a framework and guideline for developing effective services.

California's Digital Strategy is an example of how state governments can prioritize a digital-first approach to its service delivery. Local governments can achieve this too, although they may need to innovate creatively and do more with less, relying on technology vendors and local partners.

Digital product

Product ownership

Having an accountable and designated leader ensures that digital services are continuously improved and aligned with user needs.

Accountability for product outcomes must start and end with the product owner, not their partners and stakeholders. Lack of product ownership can lead to digital solutions that are:

- Over budget
- Poorly executed
- Hard to use
- Failing to meet the needs of the people

Product teams

Successful digital services are built by teams that:

- Are empowered to make decisions quickly
- Iterate on digital products based on user feedback and data

Ideally, product teams are composed of people with diverse skill sets, including product managers, designers, engineers, and data analysts. Smaller governments can create effective product teams by focusing on upskilling and cross-functional collaboration internally while leveraging external vendor help to fill gaps.

Process

Agile practices are essential for delivering digital services that are responsive to changing needs and user feedback. It is critical to understand customer pain points and behaviors to deliver valuable products

Rather than focusing on specific frameworks and methodologies, teams should prioritize agility, adaptability, and collaboration.

Adopting a minimum viable product (MVP) approach helps to deliver valuable services early and iterate based on real user input.

Technology and data

Technology usage

Governments should adopt technologies that are widely supported, open source, and interoperable. Avoiding proprietary technology solutions can improve sustainability, efficiency, and scalability.

Prioritizing best practices, accessibility, and performance across different devices will help deliver government services to more people — especially those who have low-performing devices and limited bandwidth.

Data usage

The data collected through digital services should be used to:

- Improve service delivery
- Inform decision-making

It is equally important to manage this data responsibly, with a focus on privacy and security. Data often presents opportunities for better transparency — improving trust in government services.

Mantras

- Digital first

Checklist

- [ ] Design for everyone by building services that are user-centered, accessible, and intuitive.
- [ ] Appoint a product leader and set outcomes based goals towards a minimum viable product (MVP).
- [ ] Use agile practices and buy better while testing your assumptions and products early and often.
- [ ] Default to open by being transparent and collaborative while working with widely supported tools.

- ☐ Build and empower the team, establishing a team playbook that includes a decision-making framework.
- ☐ Protect privacy of your end users and manage data rights.

Questions to ask

- Are you doing the hard work to make it easier for your end users?
- Who has the responsibility to make sure the product meets its goals?
- Do your processes and tools allow for changes in direction based on data and testing?
- Is your implementation flexible enough to succeed even if you face challenges with technology or vendors?
- Does the team have the tools and support they need and feel empowered to make decisions based on a shared framework?
- Are you building trust with end users and protecting access to user data?

Learn more

- Digital Services Playbook, U.S. Digital Service[8]
- Design principles, U.S. Web Design System[9]
- Guides: Principles and standards that shape our work, 18F[10]
- Requirements for delivering a digital-first public experience, Digital.gov[11]
- Government Design Principles, Gov.UK[12]
- Manifesto for Agile Software Development, The Agile Alliance[13]

Think exponential

By Jason Schneider

Overview

The pace of change has picked up. We used to experience periods of stability between disruptions. Change is now perpetual and pervasive. How do we build the systems, tools, and cultures that meet the changing needs of our communities today and into the future? We do it by thinking exponentially.

The problem

While the world experiences exponential change, our public institutions change more slowly. This creates an ever-widening gap between society's needs and government’s services.

The solution

There is no one solution to addressing the exponential gap. There are thousands. These thousands of solutions come from practitioners trying ideas far outside the box and sharing results for others to learn from and build on.

The network of thousands of practitioners working to address the changing world creates systemic exponential thinking. This requires our organizations to be more flexible to try new ideas while working to develop systems for sharing results across organizations.

Context

Exponential thinking is really a mental model. It’s a way of thinking beyond what exists right now and expanding the realm of possibilities.

It also doesn't necessarily rely on innovations. Most often it's rooted in the combination of two or more existing ideas in a new way.

The printing press is a good example. Johannes Gutenberg merged two ideas that had each been around for a few hundred years: movable type and the grape press for winemaking. This novel application of well-known tools accelerated societal change across the world by radically altering the speed and volume with which ideas could be stored and shared.

Mixing and matching

For the individual, thinking exponentially means breaking out of the linear tracks we usually operate within. This type of thinking comes naturally to children. Watch them mix and match toys, food, or clothes to see what the results are. Each new piece of knowledge exponentially expands what is possible for them.

This is usually trained out of us so we can put the square block through the square hole. However, we can take steps to bring this thinking back into our lives.

Apply exponential thinking

We can facilitate this type of thought by expanding our range of interests or expanding our network. Both approaches introduce new ideas for us to play with and create opportunities for novel thoughts, projects, or solutions. Not all of these mash-ups will be worth pursuing. Just like in our childhood, many concoctions should never be served during a holiday dinner. But occasionally something remarkable happens.

On the organizational level, exponential thinking can occur closer to its true definition because of the network effect of many people working together. This collective exponential thinking can come from any group of affiliated individuals — be it a club, neighborhood, business, or government.

The private sector has long embraced the benefits of exponential thinking, as it creates a competitive advantage for gaining customers and donors. This incentive helps businesses tolerate the risk of experimentation.

Unfortunately, public bodies have the opposite incentives. By nature, we are risk-averse. We do our best to steward public resources. No staff or elected officials want to be responsible for misuse of those resources. This risk aversion stands in opposition to our obligation to address the exponential gap.

To meet this challenge, the public sector needs to create environments for exponential thinking without threatening public infrastructure, data, and security. While there are many ways to do this, agencies can facilitate this approach by focusing on three steps:

1. Encourage creativity from staff and the community through practices that are non-traditional such as Human Centered Design, Liberating Structures, and Strategic Doing
2. Expand networks by increasing staff interactions across silos, organizations, fields, and geography
3. Gradually build the organization's risk tolerance through small steps — people need to feel psychologically safe in order to experiment

The multifaceted nature of exponential thinking in the public sphere will be challenging to overcome. It will challenge individuals. It will challenge institutions. These challenges will be uncomfortable.

It's crucial to remember that learning and growth only happens outside the comfort zone.

Mantras

- Think exponential
- Expand your comfort zone

Checklist

- ☐ Make time to learn new things outside of, but relevant to, your field
- ☐ Expand and maintain a network of adjacent professionals
- ☐ Help others, especially in other silos, address their challenges.
- ☐ Ask others outside your sphere to help frame or solve a challenge with you
- ☐ Define goals before defining a problem or solution

Questions to ask

- Am I, or are we, checking a box or making a difference?
- What underlying assumptions can and should be challenged?
- Is the solution or opportunity we're working on adaptable or static?
- How have others, inside and outside my field, addressed a similar challenge or opportunity?
- How will the next generation, or seventh, wish we acted?
- How can we share our successes and failures for others to learn from and improve on?

Learn more

- The Exponential Age, Azeem Azhar[14]
- The AI Revolution: The Road to Superintelligence, Tim Urban[15]
- Homo Deus: A Brief History of Tomorrow, Yuval Noah Harari[16]
- Future Perfect: The Case for Progress in a Networked Age, Steven Johnson[17]
- Collective Genius, Greg Brandeau, Linda Hill, Kent Lineback, and Emily Truelove[18]

Innovate with intention

By Dustin Haisler and Joe Morris

Overview

Government can build a culture of innovation that survives organizational challenges and drives long-term results. Innovation starts with having the right foundation for sustainable, purpose-aligned programs.

The problem

Attempts to innovate in the public sector have had mixed results, and successes are often not broadly shared. Compounding this, many widely-recognized innovation projects have struggled with long-term sustainability because of election cycles and changing leadership. Part of the challenge is a misunderstanding of what innovation is and how to codify it into a public organization's operations.

The solution

Understand that innovation is not the same as invention. Invention is the creation of something new. Innovation is about improvement or adaptation, about finding adjacent possibilities for what you already have (technology, people, etc.). There is no silver bullet for a successful innovation program, but there are elements that can ensure lasting success.

Context

Government agencies across the country have put an increasing focus on being innovative. But they often don't have a clear idea of what it is and how to implement it. They also tend to confuse innovation with invention or idea generation. True innovation is achieved when it's embraced as an operating model and as the exploration of adjacent possibilities.

Once well established, innovation initiatives must be codified to survive well beyond election cycles. This can be done through governance models that leverage internal and external stakeholders who provide stability (and diversity of thought along the way). A public agency should have a seat at the table — but not be the sole driver of an innovation program.

Long-term innovation is made possible by laying the right foundation and continuously building on it.

Engage the ecosystem

Foundationally, agencies must start by engaging their community ecosystem. This includes employees, businesses, academia, non-governmental organizations, community organizations and other stakeholders. This group should not just be traditional "leaders" — it must reflect the diversity of the community.

Align the agenda

Next, agencies must align their innovation agenda with organizational or community challenges. They can start with pre-identified organizational or community goals (i.e., comprehensive plans, etc.) or leverage an open approach to help identify them. There are numerous tools and tactics that can help with this, including:

- Challenge-based procurement programs
- Open innovation platforms (i.e., idea collection)
- Joint ventures
- Public-private partnerships (P3s)

Start small, improve continuously

Once an innovation project or set of projects is defined and mapped to community needs, leverage agile methodologies for delivery. This means starting with a minimum viable product (MVP) of the innovation and continuing to iterate over time, working in predefined “sprints” (can be two weeks or one month).

Ensure that there are clearly defined milestones and key performance indicators to guide and benchmark the program along the way. Build resiliency in your program by empowering stakeholders with the ability to drive innovation projects.

Measure, adapt, and repeat. Innovation is a continuous process. Once one cycle or project is complete, analyze what has been learned and move onto the next challenge.

Finally, look for opportunities to share success and collaborate with other agencies. Although innovation programs may be regionally focused, many tactics and best practices are applicable to all governments.

Examples

There are numerous examples from inside and outside of government that demonstrate this bottom-up approach in action, including:

- Boston’s New Urban Mechanics: civic research and design team that tackles intractable problems with experiments and prototypes
- Bloomberg Philanthropies What Works Cities, City Leadership Initiatives, i-Teams: programs designed to help advanced public innovation
- Harvard Business School Public Entrepreneurship: for students who want to solve big problems or become innovators inside government

Mantras

- Innovation is not invention

- Innovation is everyone's job

Checklist

- ☐ Engage the full ecosystem in innovation work
- ☐ Codify innovation capabilities within the organizational structure and job descriptions of all employees
- ☐ Provide opportunities to tap collective insights through open innovation
- ☐ Leverage innovative procurement practices to find, pilot, and scale new ideas
- ☐ Build innovation metrics and key performance indicators into regular council or executive reports
- ☐ Share learnings with other agencies and collaborate on joint projects that can help a broader community

Questions to ask

- Is my organization focused on solving a one-time effort or creating capacity to support innovation?
- Do I have stakeholders that represent the diversity of my overall community?
- What can I do to cultivate ideas and approaches from within my organization?
- What other organizations or jurisdictions can I partner with to scale our work and impact?

Learn more

- Where Good Ideas Come From: The Natural History of Innovation, Steven Johnson[19]
- The Adjacent Possible: A Quick Introduction, A Better Computer[20]
- Cognitive Surplus, Clay Shirky[21]
- We the Possibility: Harnessing Public Entrepreneurship to Solve Our Most Urgent Problems, Mitchell Weiss[22]

Be participatory

By Robbie Barton, Shari Davis, and Rahel Mekdim Teka

Overview

Serving the public effectively and inclusively is often at odds with top-down government decision-making. A participatory approach enables us to open space, unlock community leadership and innovation, and share power – especially when we center marginalized community members typically left out of government business as usual.

The problem

Typical government decision-making does not center the experiences, needs, and agency of the community served. Public servants are often not provided the time, resources, or support to engage deeply with the community. Residents often lack the opportunity, agency, and space to weigh in on the issues that directly impact them. This gap erodes public trust in government, ignores community expertise, and sets well-intentioned projects up for limited success.

The solution

By being participatory, we create an inclusive, collaborative culture of governance that connects us with our communities and unlocks shared potential to solve challenges together. By sharing power and centering those most impacted, we build trust and deepen relationships, create stronger lines of accountability and communication with the public, and address community issues at their roots. This mindset also helps us to build new skills, foster stronger relationships, and reimagine government.

Context

Create space people want to be in

A best practice participatory approach to public service is built on empathy, transparency, clear communication, and mutual accountability. It requires actively creating and sustaining multiple opportunities and channels for people to participate in every step of a process or effort. Critically, it places the experiences, ideas, and needs of those impacted at the center.

This opens up space for a collaborative culture to emerge that engenders trust, surfaces ideas, assets, and obstacles in a community, and fosters a deep sense of engagement and participation.

Be consistent with community-designed outreach

When participatory processes are done well, public servants feel confident and well-equipped to facilitate decision-making rather than tightly controlling it. Through consistent, deep public engagement, community members feel seen, heard, and empowered. The resulting programs and services are fully-reflective of the entire community's needs and desires.

Mutual trust and relationships that deepen over time reveal new opportunities to serve the public well, direct resources effectively, and address issues at their roots.

Adopting a participatory model

You can grow participatory culture in government on any level – within your team, across your organization, and with the larger public. Participatory processes of all sizes have been successful. The best ones strive to maximize impact and broaden participation.

For example, participatory budgeting has been used in over 7,000 places around the world to decide budgets for states, counties, cities, housing authorities, schools, and other institutions. Community members have used this process to decide budgets ranging from thousands to tens of millions of dollars.

This participatory policy-making (PPM) model can be used for any organizational decision or policy. The PPM process model typically includes six phases:

1. Planning: Assemble a steering committee that is representative of the community to write the rules of the process.
2. Idea collection: Engage the community broadly and deeply to gather their ideas.
3. Proposal development: Work with volunteers and fellow staff to build promising ideas into feasible proposals.
4. Voting: Engage the community to vote on the proposals and announce the winners.
5. Implementation: Work collaboratively with government partners and community members to implement winning proposals.
6. Evaluation: Review the process for insights and takeaways that can be incorporated into the next one.

Moving through these steps seeds a culture of trust and participation that often spills over into adjacent projects and departments. This leads to other benefits, like growing the bench of community members interested in serving their government.

Public servants who use this process also develop stronger skill sets in community relationship building, negotiating between stakeholders (including within the agency), communicating effectively and transparently, and modeling inclusive decision making.

To be participatory, we must ensure that every step of a process is:

- Equitable: Act to center community members, especially those traditionally excluded, in the process from design to implementation.

- Accessible: Directly address and remove barriers to ensure that everyone can participate.
- Significant: Ensure that participatory decisions are honored and implemented fully and transparently, not marginalized as “input” by a larger government decision maker.

Mantras

- Where there is power, share it.
- Center the people most impacted.

Checklist

- [ ] Seek out others who have used participatory models to learn from their experiences.
- [ ] Be iterative. Create an evaluation plan with milestones and metrics throughout to track outcomes.
- [ ] Secure internal buy-in from leadership. Invest in facilitation and relational skill building for staff.
- [ ] Develop collaborative capacity and dedicated resources for community participation and engagement.
- [ ] Build equity, inclusion, and transparency into agency communications, events, and activities.
- [ ] Grow a bench of community members that can serve as ambassadors, leaders, and process co-designers.

Questions to ask

- Where in our process can we make decisions together with the community members we serve?
- Who is most impacted by this funding, program, or process? Are we centering them?
- What skills, resources, and support do agency staff members need to successfully be participatory?

- What data and accessible information do community members need in order to make informed decisions?
- How are we modeling and measuring equity, inclusion, and participation in the process?
- What are we learning from the process that we can build on next time?

Learn more

- Participatory Budgeting Project[23]
- Participatory Policy-making Toolkit, Democracy beyond Elections[24]
- Public agenda research on the impacts of Participatory Budgeting, Public Agenda[25]
- We Decide! Theories and Case Studies in Participatory Democracy, Michael Menser[26]
- Dollars and Democracy: Participatory Budgeting, Laura Flanders Show[27]
- Shari Davis: The Power of Participatory Budgeting, Remake Podcast[28]

Preparation

Set guiding principles

By Laine Hendricks and Rebecca Woodbury

Overview

Guiding principles help organizations align their values to their goals. They serve as an aspirational North Star to help teams make design and content decisions. Guiding principles enable collaboration and consistency so products and services achieve better outcomes and build trust.

The problem

Local governments often have a variety of digital products and services, such as websites, permit and application systems, and 311 issue reporting systems. Each product is managed by teams working within their own context and usually without a shared vision for success and desired outcomes. This can lead to inconsistency and make it hard for teams to collaborate.

The solution

A set of guiding principles gives teams managing digital products and services a shared vision for how to achieve their organization's goals. Using these principles, teams make decisions and collaborate more easily. This alignment makes digital products more effective. It also ensures a consistent customer experience across all products or services.

Context

Guiding (or design) principles can be overarching or for specific projects or products. The primary audience is often the people responsible for managing the digital products. The secondary audiences are typically leadership and constituents.

Be memorable

Principles should be memorable. For example, the U.K. government's third design principle is “Do the hard work to make it simple.” By acknowledging that making something simple isn’t easy, the concept sticks in your head and feels important.

Be concise

They should be concise, yet clear and specific. One of the design principles for the U.S. Web Design System is “Start with real user needs.” In five words, they say it’s important to do this at the beginning of a process.

Reflect real needs

Guiding principles should also be grounded in user research. This ensures they will reflect the needs of the people the organization serves.

Marin County, CA’s first guiding principle is to be “findable.” This was based on extensive user interviews with the community as well as employees which showed the biggest pain point people had was finding what they were looking for. Community needs will change, so periodically revisit and revise guiding principles to ensure relevance.

Get buy-in

Get organizational buy-in on your guiding principles by creating them through an inclusive process. The principles themselves should be written together with your team, and with the community. The user research you use to inform them should be reflective of the community you serve.

Reference often

Once your principles are established, they should be referenced often. Share them:

- At project kick-off meetings
- In procurement materials

- On posters in the office, or stickers

Mantras

- Be principled
- Guide with principles

Checklist

- ☐ Create your guiding principles through an inclusive process.
- ☐ Share your guiding principles with your organization and the community.
- ☐ Refer to your guiding principles when making decisions.
- ☐ Include your guiding principles in relevant procurement. announcements so vendors understand your goals.
- ☐ Revisit your guiding principles annually and revise if needed.

Questions to ask

- What are you trying to achieve?
- How do your services relate to your organization's strategic goals?
- Do your principles reflect your community's needs?

Learn more

- How guiding principles can improve a content strategy, Josh Tong[29]
- SF.gov content principles, SF.gov[30]
- U.S. Web Design System Design principles, Digital.gov[31]
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Appoint an owner

By Daniel Soto

Overview

To ensure the success of products and services, governments must identify and empower a single product owner as leader.

The problem

As governments approach products and services, they often get stuck or deliver a product that doesn't meet the needs of the people they intend to serve. This can happen when the product doesn't have an owner. The team may be unsure of its next step, lack a vision, or not know where to go for help.

The solution

Governments need to appoint a product owner: one person who is ultimately responsible for carrying out the vision of a product or service.

Governments must empower the product owner to:

- Inform and engage stakeholders
- Keep user needs at the forefront
- Make difficult decisions
- Connect with users often
- Build team momentum
- Lead with empathy
- Be flexible

An empowered product owner will make sure a public service is successful.

Context

Product owner leadership

A product owner is different from other leadership roles in government because it entails more than just supervision or management. Not everyone in leadership roles is good at deploying digital products and services.

Instead, government should embrace the concept of a **product owner:** a person who is responsible for carrying out the vision of a project.

A product owner works with others to champion a product or service from beginning to end. They are ultimately responsible for the success of the digital product or service. The product owner must be empowered to lead in a new way.

An empowered product owner should:

- Be focused
- Understand the government agency and the users' needs
- Use that understanding to set a vision–and stick to it
- Communicate with stakeholders to identify problems and options to solve those problems
- Maintain communication with stakeholders throughout the life cycle of the digital product or service
- Advocate to make sure the digital product or service solves user needs
- Know when it's time to retire a digital product or service

Product vs. project

Know the difference between project manager and product owner.

Project

A project is a one-time undertaking with the goal of creating a product. It has a finite beginning and end, as well as a defined outcome.

Product

A product is a service, process, report, policy, web application, or website that satisfies the needs of users. It goes through a life cycle, being developed and introduced, grown and improved upon, and retired once it's no longer needed.

A product owner owns the digital product or service

The project manager is a task master who makes sure that tasks and assignments are completed on time.

The product owner's role encompasses the absolute ownership of the digital product or service — and extends beyond launch. The product owner's role follows the life of the digital product or service.

Lead with a product mindset

For product owners to lead effectively, they must be fully empowered by leadership. This means those in decision-making positions within the agency explicitly identify and empower one individual as a product owner.

The empowered product owner:

- Sets the vision and communicates it to the team
- Communicates why change is needed and the path to success
- Focuses on user needs
- Practices openness and facilitates open communication
- Makes informed decisions based upon a continuous feedback loop with stakeholders
- Is flexible and available
- Has subject matter expertise and uses it to solve problems
- Builds momentum by engaging and inspiring others
- Advocates for support within the government agency
- Is ultimately responsible for the success of the digital product or service

As 18F's Hannah Kane writes:

> "An empowered product owner is someone who understands your organization, the problem we're solving, and can advocate for the product we ultimately build together. They'll be responsible for establishing and carrying out the long-term vision of the project, implementing a strategy, and guiding its progress."

Mantras

- Appoint an owner

Checklist

- [ ] Identify a product owner.
- [ ] Empower the product owner to have the authority to make decisions.
- [ ] Ensure the product owner has dedicated time to work on the product or service.
- [ ] Ensure the product owner has subject matter expertise about the product or service and its users.
- [ ] Have the product owner serve as an advocate for the digital product or service.

Questions to ask

- Who is the product owner?
- What organizational changes will ensure the product owner has authority over the product or service?
- How is the product owner putting user needs at the forefront?

Learn more

- What is a product owner?, Department of Civic Things[35]
- The empowered government product owner, ProudCity[36]
- Successful Agile in government: Supporting the product owner, Deloitte[37]

- So, you're a Product Owner…, 18F[38]
- Digital Services Playbook Play 6: Assign one leader and hold that person accountable, U.S. Digital Service[39]
- Extreme ownership for local government, International City/County Management Association[40]

Improve team effectiveness

By Karen Daly

Overview

Government teams are often challenged by a lack of resources and focus. The Incident Command System (ICS) used in disaster response frameworks can help teams working on everyday services and projects be more effective. In disaster management, these tools empower teams and keep them aligned to the mission.

The problem

Teams are often not prepared to do the work they have been assigned. If they don’t have direction and adequate resources, they have the difficult task of trying to work effectively together to achieve their goal. There is power in teamwork, but it is often left unrealized when teams lack the tools and focus they need to conquer their assignment.

The solution

Incorporate Incident Command System (ICS) techniques to build strong and effective teams. These tools ensure everyone uses the same game plan and works towards a common goal. While designed for disasters, at their core ICS techniques are frameworks that help teams organize, respond quickly, and communicate, they’re applicable for any government project.

Context

The tools developed to respond to disasters help disparate groups to work together and quickly align around a common goal. In disaster response, everyone is trained and follows ICS, which has been adopted as a national framework by the Federal Emergency Management Agency (FEMA). The principles of ICS are wonderful tools to use to support team success.

Here are some examples of how to incorporate these principles to create and achieve better teams.

Incident Action Plan

The Incident Action Plan (IAP) is the roadmap that disaster response teams use to establish goals, document tasks, and communicate with each other. The IAP identifies tactics (how a task will be approached) that will be used to complete assignments that advance overarching goals (how the mission will be resolved).

This keeps the project moving along and ensures teams are accountable and timely. Deciding the frequency of IAP updates at the onset is paramount. It will depend on how often the team is scheduled to meet and the timeframe that is allocated to the team.

Consistent communication

Regular communication within teams and to stakeholders increases accountability and ensures that the team is staying on track. Assigning a team member to be in charge of reporting progress, tasks, and other notable information keeps everyone on the same page. It also ensures that the team is reporting their progress to stakeholders.

Training and preparedness

Creating a team to tackle a project should be purposeful. Teams often need to be trained or oriented so they can function as a unit. Ensuring that each team member understands the mission and why they were selected helps the team embrace their role.

When teams have shared understanding of the talents, traits, and role of each member, their effectiveness increases. This can include personality trait assessment or other types of team talent analysis.

Operations

During a disaster, tools, equipment and safety are paramount in the daily updates to the Incident Action Plan. Giving teams the time and resources they need to complete their objectives is critical to success. Ensuring that individuals feel safe to make recommendations or explore innovation allows the team to be as creative as possible. Encouraging (or requiring) teams to provide frequent updates will ensure the team stays on track.

Disruption

In disaster response, teams must do work that is not within their normal scope nor in their job description. Because disasters always cause disruption, the team has to adapt and innovate.

Applying this approach to other tasks allows the team to creatively identify solutions outside the norm. They may find outside-the-box solutions that would not be unearthed in typical day-to-day operations.

Debrief and celebrate

One of the most useful tools in ICS is the debrief or “hot wash.” This gives everyone a chance to look together at what worked, what didn’t, and lessons learned. It also gives all of those involved a chance to come together one more time to reflect and celebrate a job well done.

Too often, we finish a project and don’t even look up before moving on to the next task. Taking time to celebrate and acknowledge the team’s accomplishments is important to employees. This debrief also allows teams to learn from their experience and identify ways to improve in the future.

Mantras

- Treat your projects like a disaster.

Checklist

- ☐ Ensure your team has a charter that covers purpose and expectations
- ☐ Require consistent communication on the team's progress
- ☐ Make a roadmap ("Incident Action Plan")
- ☐ Communicate regularly
- ☐ Give the team the tools and support they need
- ☐ Take time to debrief when the project is done

Questions to ask

- Does the team understand their task and expected outcomes?
- Who needs to be informed of the team's progress and direction?
- Who does the team ask for more resources or information?
- Does the team have what they need to be successful?
- How do you give teams permission and safety to be "disruptive" and creative?

Learn more

- Incident Command Resource Center, Federal Emergency Management Agency[41]
- Incident Management, Ready.gov[42]
- Emergency Management and the Incident Command System, U.S. Department of Health and Human Services[43]
- True Colors Test, Individual Differences Research[44]

Go official

By Luke Fretwell

Overview

Government must take every action it can to present itself as official on the internet, whether it's websites, email or social media. This lessens public confusion about what digital properties and sources are legitimate. It also builds trust in government institutions.

The problem

Misinformation continues to spread on the internet. Bad actors spoof official government websites, email, or social media accounts to spread falsities or steal personal information and money. There are also private entities selling government related services that can be confused as official. Many government websites still use non-.gov domains or don't follow verification protocol for online accounts. The lack of uniform commitment causes public confusion about what can be trusted as official.

The solution

U.S. government websites should adopt the .gov domain extension. When available, government social media accounts should follow formal verification protocol and link to .gov websites. Doing this communicates to the public that .gov websites and verified accounts are the sole, trusted online sources of official government services and information.

Context

Getting digital official gives the public a sense of trust and security needed for a healthy democracy.

Go .gov

“It should be easy to identify governments on the internet, and using a .gov domain shows you’re official,” the .gov registry website says. “The public shouldn’t have to guess whether the site they’re on or the email that hits their inbox is genuine.”

Every website on the internet has a top-level domain, such as .com (commercial), .org (organization), or .gov (government). While most can be easily acquired by anyone through a number of commercial domain registries, the .gov extension is only one available to official U.S. government organizations.

These include:

- Federal, state, local, or territorial government entities
- Tribal governments recognized by the federal or a state government
- Other publicly controlled entities

Registration for a .gov is free. The .gov domain registry is operated by the U.S. Cybersecurity and Infrastructure Security Agency.

Government non-.gov domains can potentially confuse users and create opportunities for non-government entities to spoof official government services. Adopting a government sponsored top-level domain (sTLD) – like .gov, .edu, .mil – ensures users are visiting an official government website or receiving email from a legitimate source.

To emphasize the official, government sites should add a “this is an official government website” with a “here’s how you know” link that takes users to an explanation so they better understand.

Get social official

Social media is a communications medium used by millions of people globally. With this instant, continuous connection comes the potential for misinformation and disinformation. Bad actors use social media to spoof official government accounts.

Some social media platforms have processes for government verification so that the account is designated as official. Follow this protocol to give a higher level of trust and confidence when the public engages with these accounts.

Get digital official

Take the steps to be government official online. Addressing this important detail brings more trust to government and the internet as a whole.

Mantras

- Go gov official
- Get digital official

Checklist

- [ ] Inventory all of your digital assets (websites, social media, etc.).
- [ ] Register and configure your website with a .gov domain.
- [ ] Review social platforms and follow any formal verification processes.
- [ ] Add a social media page to your website with links to official accounts.

Questions to ask

- Who is responsible for our organization being digital official?
- Do we have an inventory of our digital assets?
- Are all of our websites .gov?
- Have we reviewed the verification process for social platforms we use?
- Do we have a social page on our website?

Learn more

- Get.gov[45]
- Benefits of .gov domains, get.gov[46]
- An introduction to domain management, Digital.gov[47]

Buy better

By Catherine Geanuracos and Rebecca Woodbury

Overview

Finding technology for service delivery and operational goals can be daunting. It's hard to navigate the government technology marketplace and easy to be swayed by persuasive sales people and slick marketing. Simplifying the "ask" and staying focused on problems and users (not requirements) makes buying tech manageable.

The problem

Most government procurement practices are outdated, restrictive, and ill-suited to buying modern SaaS (software as a service) products. Overly specific Requests for Proposals (RFPs) with cumbersome response requirements produce low response rates. Complex RFPs make it harder to evaluate what's really important from vendors.

This stifles competition and innovative government technology solutions, which leads to lackluster public services, frustrated staff and residents, and wasted time and money.

The solution

Procurement practices and policies should allow governments to effectively buy technology solutions and replace outdated technology when it's no longer serving the needs of staff and the public. Technology vendors should be able to easily respond to government needs, expanding competition and choice.

Governments can implement better practices to facilitate streamlined, less stressful tech purchasing. Demanding choice and better outcomes pushes vendors to innovate, continuously improve, and provide great customer service.

Context

Do your own research

Get a sense of what's out there: search the internet, review case studies, and ask other agencies what they use and if they like it.

Raise your contracting limits

Increase limits and only do a full RFP process when it's really warranted. Your research might find something for less than the amount that requires formal procurement.

Maximize vendor participation

Make it easy to respond to your solicitation, if one is required. Drop overly prescriptive requirements (such as having implemented the exact type of project with your exact type of government).

It might be tempting to base your requirements on the capabilities of a specific vendor, but this leads to bias and limits your vendor pool.

Governments are often swayed by vendors offering a suite of products because:

- Dealing with one vendor seems easier than managing multiple contracts
- Internal users want one login

These don't typically end up being true or leading to better public service. And you might miss out on a vendor who does something you need really well.

If you must list all the things you need in one RFP, allow vendors to only respond to parts.

Describe the problem, not the solution

Instead of overprescribing the solution with pages of requirements, focus on detailing the problem you are trying to solve or the service you want to provide. Provide context, desired outcomes, strengths, known pain points, and the root cause of the problem.

If you don't have this information you might need to do research to better understand your and your community's needs. Develop and share guiding principles and organizational priorities with vendors and use them in your evaluation process.

Don't assume the way your technology worked in the past is how things should work in the future!

Be firm on non-negotiables

Accessibility

Government services need to work for everyone, by law. This includes digital information and services provided by third party vendors.

Interoperability

Look for vendors that work well with others through APIs, open source, and integrations, when it makes sense.

Security

Demand strong security practices, including multifactor authentication, regular updates, and secure hosting.

Privacy and data ownership

You are a steward of important data! Make sure you can access and export the data your systems collect. Read and understand vendors' privacy policies.

Evaluate the right aspects

Local governments struggle to make good technology buying decisions. This can result in overpaying for subpar technology.

Key factors to evaluate:

- How well it helps you achieve your goals
- How it improves productivity and reduces friction
- Ease of setup and IT burden (use vendor-hosted SaaS whenever possible)
- Cost (setup, annual maintenance or subscription)
- Track record (avoid vendors who failed similar projects or had lawsuits)
- Data access and security
- Can you try it? (not just a demo)

Focus your evaluation criteria on the non-negotiables and user experience.

Use each procurement to move towards a modern, modular tech "stack" for your government, where pieces can be changed out when a better solution becomes available.

Mantras

- Buy better
- Simplify to expand your options

Checklist

- [ ] Describe the problem you are trying to solve and challenges you face.
- [ ] Get rid of outdated requirements that don't help you find the best vendor.

- ☐ Increase your purchasing authority so you can use informal bidding for smaller scale projects.
- ☐ Involve people who use the software day-to-day (staff and residents) with evaluating the vendors.
- ☐ Try before you buy.

Questions to ask

- Does bundling under a single vendor improve services or is it just easier to purchase?
- What underlying values drive technology decisions in your organization?
- How committed are your vendors to the non-negotiables?
- Does the vendor have a track record of easily integrating with other third-party systems?
- Have you spoken to other governments who've used the software? Do they like it?
- Is this a technology problem or do we need better policy and business processes?

Learn more

- Public Technology Procurement Guide, Public Code Foundation[48]
- Govtech Industry Standards: Developing values-based procurement criteria for technology sourcing, Catherine Geanuracos[49]
- Procure Access, DisabilityIN[50]
- Local government website buying guide, ProudCity[51]
- Modular Procurement for State and Local Government, 18F[52]

Implementation

Show the work

By Rebecca Woodbury

Overview

Working in the open makes things better. By sharing what a team is working on, people can follow progress and give input throughout a process rather than at the end. Updates and open collaboration tools help teams keep momentum, get feedback, build trust and celebrate wins.

The problem

Government agencies often wait to ask for feedback on services, programs, and policies near the end of a project. By that time, stakeholders feel their feedback won't have an impact. It's costly to make significant changes. When people are left out, you miss out on their ideas and lose their trust. It also increases risk of lawsuits and failure.

The solution

Regular updates and open collaboration tools allow teams to share what they're working on. People track progress and provide feedback while the work is being done. This allows the teams to make iterative changes throughout the process. They build trust because they provide transparency to stakeholders and partners, and the public. Anyone interested or impacted can follow along and avoid surprises at the end.

Context

Designing government services and policies that work for everyone is hard. Not only do they need to work for the public, they also have to work for the departments and agencies that are part of implementation and delivery.

To get this right, government teams designing these services need feedback and buy-in from different stakeholders.

Invite feedback

At the start of a project, input is usually general in nature. This input helps align values, develop guiding principles, and shape goals.

Near the end, significant resources have already been spent and changes are more costly. Feedback can be harder to incorporate at a certain point, depending on timelines and budget.

Teams need ways to get feedback throughout the process of designing and creating new things. This allows them to make small changes and test them. The likelihood of project success increases if the team is able to test iteratively throughout the design process, rather than wait until the end to get feedback.

Get buy-in

To be successful, services and policies need buy-in from people impacted by them. Often projects encounter challenges when stakeholders feel blindsided or surprised by a change.

Teams need ways to keep people informed throughout a project. Updates should be easy to understand and concise. They should include ways for people to give feedback.

If these updates are regular and helpful, stakeholders will feel informed and part of the process. This will create buy-in and increased trust in the process, even if they may not agree with final decisions.

Share updates

Provide regular updates with a simple blog, newsletter, or news post. Use links to more context if needed.

Include:
- Purpose and dates covered
- Recap of wins and progress
- What the team is working on next
- A way for people to give feedback

Collaborate in the open

Use open collaboration tools to show what you are working on. This provides context so people can understand the thinking behind the work, progression, complexity, and contingencies. It can also provide a way for people to contribute ideas and suggestions.

Collaboration tools are commonly used to develop software. They can also be used for programs, policies, services, and projects.

Include a:
- General roadmap
- Public view of your process and progress
- Code of conduct
- Way to report issues or suggest ideas

Mantras

- Show the work
- Share the done/doing

Checklist

- [ ] Create a template for your updates.
- [ ] Brand the updates so people know what project the update is about.
- [ ] Keep updates succinct and digestible.
- [ ] Include a way for people to provide feedback to the team.
- [ ] Allow and invite stakeholders to subscribe.

- [ ] Promote with stakeholders on your website, social media, and email updates.

Questions to ask

- Are you getting regular feedback from stakeholders?
- How do people stay informed about projects they're interested in?
- Do people internally and externally feel engaged throughout the entire process?
- Do projects regularly get derailed at the end?

Learn more

- Filling in the gaps - The case for public backlogs and roadmaps, (Retrieved 2024, September 9), Public Digital
- How Login.gov uses roadmapping to build trust with its partners and the public, (Retrieved 2024, September 9), Digital.gov
- Alpha team blog, (Retrieved 2022, January 5), Digital.CA.gov
- Doing/done: The beauty of GOV.UK's 'What we're working on' updates, (Retrieved 2024 June 17), GovFresh
- Open civic organizations, (Retrieved 2024, August 1), GovFresh
- U.S. Web Design System core project Github, (Retrieved 2024, August 5), U.S. WDS

Say what matters

By Morgan Griffin

Overview

When you're communicating with the public, it's not about you (or your agency) — it's about your users. Government must communicate in a way that helps people understand essential information and take action.

Clear communication helps users accomplish tasks, makes their lives easier, and builds their trust in government services.

The problem

Too often, government communications face inward. Agencies are talking to themselves. We tout accomplishments — "subcommittee issues preliminary recommendations to panel" — without explaining what they might mean for people and communities. We use acronyms and initialisms and jargon.

Result: everyone loses. We waste time and effort on communication that confuses (or is ignored by) its intended audience. And the public doesn't find out whatever we were trying to tell them.

The solution

As a civil servant, it's not enough to just release information, to get it up on your website or fire off a press release. Instead, you need to have a conversation with your audience. Don't just say what you want to say. Figure out what your audience needs, then say that instead.

Better communication is a low-cost solution that has an outsized impact. (It could even reduce cranky phone calls to your offices.)

Context

Know your audience

Decide who you want to reach

If your answer is “the public” or “everyone,” think again. Narrow down your target. Having a specific audience in mind will help you focus and improve what you write.

For example, if you’re drafting a news update about improvements to your transit system, your audience isn’t just “the public.” It’s more specific — maybe commuters, students, people with lower-incomes. The most effective approach may be targeted messages to different groups using different channels.

Learn about your users

User research might sound daunting and expensive, but it doesn’t have to be. You can learn a lot by doing informal interviews at a community center or library. Talk to family, friends, or neighbors. Outside perspectives will challenge your assumptions.

Have empathy

The people you’re communicating with are busy and distracted. They have screaming toddlers. They have learning disabilities. They’re sick, their cat is climbing on their keyboard, their wifi is atrocious.

You are writing for people who are skimming (at best), not reading.

That’s especially true if you’re communicating about difficult topics. Users learning about housing assistance or probate may be especially stressed and struggle with complex information. Be kind to them.

Check yourself

Set aside your ego

Let’s say you’re really proud of the work your team has done improving your recycling program. It’s taken years of listening sessions, meetings, research, and writing.

But before you make a webpage about that new program, with a timeline and names of everyone on the task force, ask yourself: who is this page really for? Will residents actually care? Maybe all the public needs to know is which color bin their plastics go in now.

Don’t overshare

Government agencies strive for transparency — a worthy goal! But being transparent doesn’t mean sharing everything. Don’t flood your communication channels with every memo and pie chart of performance metrics. Only share something if your audience needs it.

Oversharing undermines the goals of transparency — because it becomes much harder for people to find what’s valuable amid all the other stuff.

Be strategic

Keep it focused, simple

Don’t tell people everything you know about a topic. Share only what they need to know. If you overwhelm people with 25 bullet points on a topic, they may ignore all of them.

Stay targeted on your audience and main message. Use plain language and usability best practices.

Use readability tools

While they are blunt instruments, readability formulas (like the Hemingway app) give you some direction about how to improve your communication. (This chapter is written at a grade 6 reading level, and aiming for grade 4 is even better.)

Collect feedback and iterate

After you share information, track metrics — like hits on your website or a reduction in phone calls. Keep improving your communication based on what you learn (although try not to be too reactive to a few loud voices).

Mantras

- Give the people what they need
- Need-to-know, not nice-to-know

Checklist

- [ ] Start with a clear audience and main message.
- [ ] Center your audience as you write.
- [ ] Include only need-to-know information.
- [ ] Have a clear call to action.
- [ ] Keep it conversational.
- [ ] Don’t overshare.

Questions to ask

- Does my audience need to know this? Will they care?
- Why am I sharing this information? What’s my goal?
- Am I having a conversation, or am I lecturing?
- Am I helping my audience understand how to take action?
- Are we really legally required to publish this — or are we just assuming we are?

Learn more

- Content Design, Sarah Winters (2017)
- Good Services: How to design services that work, Lou Downe (2020)
- Hemingway Editor
- The Service Organization: How to deliver and lead successful services, sustainably, Kate Tarling (2023)

Speak plainly

By Echa Schneider

Overview

We serve our communities best when we communicate clearly, directly, and without frills. We owe it to the public to make it as easy as possible to understand and access government services. Dense, confusing text is one of the simplest obstacles to remove.

The problem

Government websites, forms, and other publications are often difficult to understand. Key information gets buried under technical details and jargon. This reinforces perceptions of government as opaque and inefficient.

Unnecessarily complex text creates barriers to public services for everyone, but especially for those with limited language skills, education, resources, and time. It also increases the workload for public servants due to time spent explaining and correcting misunderstandings.

The solution

Write in a way that your intended audience can easily understand. This means speaking directly, plainly, and leading with the most important information.

By taking the time to break complex policies and processes down to their essential parts and communicate them clearly, we show respect for the public and make it easier for everyone to access government services.

Context

Most digital government improvements are expensive and time consuming. Taking care to write simply costs nothing. Re-writing existing content to be more clear can be done iteratively, quickly, and at low or no cost. It does not require extensive prototypes, a large team, or specialized study. Everyone can — and should — learn to write more clearly.

In an era of growing expectations and increasingly constrained resources, communicating using plain language principles is low-hanging fruit that today's government agencies should not ignore. A public policy, program or service is only as useful as how well (or not) it is communicated to that public.

Speaking plainly benefits everyone

Clear, simple writing is especially important when serving people with cognitive disabilities, those using assistive technology, people with low literacy skills, and English learners. But the dividends are not limited to those with special needs. These practices make government more accessible to everyone.

All of us have too much to read, too much to do, too much information coming at us on a daily basis. Just because someone has the education or ability to parse dense writing doesn't mean they want to or have the time to do so. Surveys have shown that those who spend the most time dealing with complex information have the strongest preference for plain writing.

Less is more

Often, we try to preempt questions by providing as much information as possible.

This may manifest in lengthy technical definitions, detailed background explanations, or attempts to address every issue or objection. It backfires. Documents that strive to be comprehensive are usually too dense to be useful. When faced with “information overload,” most readers simply shut down.

It is our responsibility to distill the complexities behind our programs to their actionable core. It is crucial for people writing these documents to understand what information is immediately relevant and what is not. When we give people only the information they need to complete a task, we reduce support requests while increasing satisfaction and confidence in government.

Focus on impact

When deciding what information to include and what to leave out, focus on impact. Most people don’t need or want to know the reasoning behind every rule or the full backstory of a program, only how it affects them.

Consider why someone would seek out and read your document. What goal are they trying to accomplish, and what do they need to know to be successful? Put the most important information first. Omit unnecessary details.

Be conversational

Another common instinct is to convey authority by writing in a formal or bureaucratic tone. In practice this creates distance between ourselves and the people we serve. We show the most respect by communicating in a straightforward, conversational manner.

Speak directly to your audience, addressing them as “you.” Write in the active voice. Use a friendly, helpful tone: imagine you are speaking to your reader face-to-face. Read your draft out loud before publishing, and revise any parts that don’t sound natural. Remove acronyms or jargon that may be familiar to you but not someone working for the government.

Make text scannable

Make it easy for people to find what they’re looking for and then take action.

- Use headings and bulleted lists to make content easy to scan.
- Stick to one idea per sentence.
- Keep paragraphs short.
- Use the simplest words possible to convey your message.

Mantras

- Opening up, not dumbing down
- Simple writing takes hard work

Checklist

- [ ] Put the most important information first.
- [ ] Make text scannable with clear headings and bulleted lists.
- [ ] Leave out information that does not help the reader complete their task.
- [ ] Keep sentences short and structure them simply.
- [ ] Use a conversational tone.
- [ ] Avoid acronyms, jargon, and technical language.

Questions to ask

- What is the person reading this document trying to accomplish?
- Am I sharing this information because it is necessary or because I find it interesting?
- When I read this out loud, does it sound natural? Is it easy to follow?
- Am I using a two dollar word when a five cent word will do?
- Is there a way to say this more simply?

Learn more

- Letting Go of the Words, Ginny Redish (2012)
- Use plain language, (Retrieved 2025, May 10), 18F Content Guide
- Federal plain language guidelines, (Retrieved 2022, July 22), plainlanguage.gov

- Plain Language Speaks to Everyone, (Retrieved 2022, July 22), NYC Digital on Medium
- Starting a Plain Language Initiative in Your Organization: A Step-by-Step Approach, (Retrieved 2022, July 22), Washington Governor Jay Inslee

Stay accessible

By Stan Sarber

Overview

Making digital products and services usable by people with disabilities is not only the right thing to do, it is also a legal requirement.

The problem

Many government websites, digital services and mobile apps were created without digital accessibility in mind. Community members with disabilities often find it frustrating (or impossible) to use these services.

Inaccessible digital products also expose local governments to litigation risks. Many local governments are aware that accessibility is required by the Americans with Disabilities Act (ADA) but don't know how to ensure accessibility of their digital services.

The solution

Public agencies should treat accessibility as a high priority and not as an afterthought. Digital projects should be designed with accessibility in mind. This means including someone with accessibility expertise in the early stages of digital projects.

Governments also need to know how to hire vendors who understand the importance of accessibility and are compliant with accessibility standards.

Context

Most local governments know that making their digital assets such as websites, mobile apps and PDFs accessible is important. But what does it actually mean?

Understand who needs accessibility

According to the Centers for Disease Control and Prevention, 1 in 4 adults in the United States live with a disability. There are different types of disabilities, for example:

- Vision: blindness, low vision, color blindness
- Mobility: hand tremors, paralysis
- Hearing: deafness, hard-of-hearing, audio processing disorders

Digital accessibility means that digital products are usable by people with disabilities. Some common accessibility features are:

- High contrast (vision)
- Sufficient touch areas on mobile devices (mobility)
- Video captions (hearing)
- Alternative text for images (vision)
- Keyboard navigation (mobility)
- Accessible PDFs

The de-facto standard for digital accessibility is Web Content Accessibility Guidelines (WCAG). There are three levels of compliance: A, AA and AAA. Many government agencies and organizations strive to meet Level AA.

Accessibility is hard

Some local governments employ people dedicated to accessibility, but often they are not technical enough to communicate what needs to be done to make digital products accessible. Even when accessibility is identified as a requirement, it may be unclear how to actually implement it, how to vet vendors for compliance, or how to educate on-staff developers.

Put someone in charge

It's hard to get accessibility projects off the ground. Designate an accessibility lead to set goals and timelines, hold the team accountable, and verify quality.

Invest in training

Everyone working on digital service projects can benefit from training on accessibility fundamentals. When every team member understands the basics of accessibility, it's easier to "bake in" accessibility into your projects.

Audit, fix, test

To make digital content accessible means to:

- Audit the digital products for accessibility using software tools and manual testing.
- Apply fixes to the underlying code of the application or via a content management system,
- Re-test the content to verify that issues have been fixed properly.

Fix easy issues first

Using free tools like WAVE, Lighthouse or Contrast Checker, you can identify common issues such as insufficient contrast ratio, missing text alternatives, accessibility labels or video captions. Even someone new to accessibility can fix these kinds of issues.

For more complex issues, you may need to contract with a vendor specializing in digital accessibility.

Accessibility is not easy and can be confusing to navigate both the legal and technical landscape. However, it is achievable with some process improvements and technical help.

Mantras

- Aim for progress over perfection
- Enthusiasm and empathy are superpowers

Checklist

- [ ] Choose an accessibility lead. This person will drive the accessibility initiatives.
- [ ] Survey your digital products and audit them to determine which are not accessible.
- [ ] Collect accessibility reports and determine who will do remediation work.
- [ ] Do the work or delegate it to someone else.
- [ ] Run an audit again to verify improvements.
- [ ] Create an accessibility statement and include it with your digital content.

Questions to ask

- Who can we assign to be the accessibility lead?
- Do we have internal resources to do accessibility audits or should we hire a vendor?
- Can we run a training program to educate employees on digital accessibility?
- Do we have PDFs to remediate?
- Do we have digital products (websites, apps) to audit?
- Who can run the audits and fix issues?

Learn more

- An Introduction to Accessibility, (Retrieved 2023, September 25), Digital.gov
- Introduction to WAVE, (Retrieved 2023, September 25), WebAIM on YouTube
- Improving the Accessibility of Social Media in Government, (Retrieved 2023, September 25), Digital.gov
- Developing an Accessibility Statement, (Retrieved 2023, September 29), w3.org
- Why AI & Overlay Widgets Fail to Protect or Serve, (Retrieved 2023, September 25) Accessibility Works
- Web Accessibility Guidelines in 7 Minutes, (Retrieved 2023, September 25), GoDaddy on YouTube

Design for everyone

By Mai-Ling Garcia

Overview

Local governments address making services better, “digital,” and more inclusive — frequently all at once. Local governments are often leaders in redesigning public services. As a result, we need an inclusive approach that includes everyone.

The problem

Technology solutions are often not designed to focus on people's needs. Agencies prioritize technical details or features staff want instead of considering what residents need. This focus on features and organizational needs creates overcomplicated processes and exclusionary designs, limiting people’s access to services.

The solution

We can create digital services that meet community needs by including residents and government staff in the research process, allowing their feedback to inform decisions and testing ideas. It's important to keep improving and making changes based on community input. Through research, metrics, and ongoing testing, we can ensure digital services increase everyone's access to city services.

Context

Local governments can better reflect the populations they serve by considering lived experiences, accessibility, and data in their work. While larger cities may assemble comprehensive teams of product managers, designers, UX/UI experts, and engineers, smaller cities tend to succeed by leveraging hybrid teams of contractors, in-house talent, and community experts to design digital services.

Build a team that reflects the community

Building diverse teams improves decision-making and can increase your organization's connection to its constituents.

"Lived experience" is critical expertise about social issues, places, and people based on a person's personal and professional experiences. This expertise offers valuable perspectives and knowledge to solve community problems and design for resident needs.

Including "lived experience" experts from your community can take many forms, including:

- Having them play key roles on your team
- Hiring them as consultants to a project
- Hiring community groups to lead the design project itself

Design around resident needs

Local governments can source quantitative information from call centers (i.e., 311), website analytics, and other data sources. Any digital service redesign should also include qualitative interviews with people using the service, especially the most vulnerable residents significantly impacted by your service.

Your research should tell you:

- How residents currently use and access the service
- Pain points experienced by residents in using and accessing a service
- What vulnerable community members need

Define and create success together

Use a combination of community insights and industry standards to determine success. Metrics could include:

- Accessibility: Ensure websites are usable for everyone, particularly for those with disabilities.
- Usability: Identify metrics to evaluate ease of use, friendliness, and efficiency of online tools.
- Product Inclusion: Evaluate how well a product or service caters to the needs of diverse users.

Once you understand resident needs and successes, think about creative ways to address those metrics. Explore different possibilities before you begin prototyping.

Test with users

A prototype is an initial model of a product designed to test and refine concepts before the final version is developed. Once a digital service prototype is built, it is crucial to test it with people from different backgrounds, demographics, and abilities.

Testing prototypes generally involves observing someone using your product and noting their behavior against your success criteria. This allows you to identify opportunities for improvement and refine the prototype to better address user needs.

This iterative design approach allows for continuous enhancement of prototypes and even burdensome policies based on user input.

Closing the loop

After launching a digital service, it's crucial to collect continuous feedback from the community and agency staff. You can:

- Embed feedback tools within a service for real-time user comments.
- Use analytics to track engagement and identify usage patterns.
- Create forums for community input.

Regular user testing sessions can help prioritize new features, updates, and adjustments. Leverage open communication channels like social media and newsletters for ongoing dialogue.

Responsiveness to this feedback is key, as it will inform the iterative changes that keep the service user-centered and effective in meeting the community's evolving needs.

Mantras

- Designing for the margins helps everyone.
- Include, iterate, improve.

Checklist

- [ ] Design around resident needs.
- [ ] Build a team that reflects the population you serve.
- [ ] Learn about design standards and resources.
- [ ] Define success together.
- [ ] Test prototypes with diverse user groups.
- [ ] Collect feedback and iterate.

Questions to ask

- Does your team look and sound like your community?
- How can you design services for the margins? How does this benefit others?
- Who benefits most from your re-designed services?
- How will you measure success?

Learn more

- Orchestrating Experiences: Collaborative Design for Complexity, Chris Risdon and Patrick Quattlebaum (2018)

- Equity Centered Community Field Guide, Creative Reaction Lab (2018)
- Building for Everyone, Annie Jean Baptiste (2020)
- Good Services: Decoding the Mystery of What Makes a Good Service, Lou Downe (2020)

Secure yourself

By Shannah Hayley and Joel Peña

Overview

In local government, digital security is often treated as an add-on rather than a standard expectation. From ransomware to downed operations, the costs of a casual approach to security — both financial and to citizen trust — are too high to ignore. When it comes to public services, security is not optional.

The problem

Failure to secure digital systems leaves government organizations vulnerable to cyberattacks, unauthorized access and data breaches. This compromises sensitive information, including classified data, and puts citizen records at risk for privacy violations and identity theft.

Inadequate online security systems expose public agencies to substantial financial, reputational, and operational consequences — including erosion of public trust.

The solution

Governments must treat security as non-negotiable. This involves committing to cybersecurity best practices like:

- Strong passwords
- Multi-factor authentication and strict security policies
- Investing in robust online security systems that include data encryption, firewalls, and intrusion detection

Organizations must also budget to keep technical operations secure and continuously train staff on digital security.

By implementing robust strategies and adopting best practices, your organization can mitigate risks, protect sensitive data, and maintain the trust of citizens.

Context

Digital security is everyone's job. Tackling this topic effectively requires a coordinated multi-pronged approach.

Establish a cybersecurity culture

Digital security starts with fostering a culture of cybersecurity awareness and responsibility.

Begin by training employees on best practices. Encourage a proactive approach to identifying and reporting potential threats. This will establish a sense of ownership in protecting online systems among all staff. There are many free and low-cost tools for cybersecurity education from trusted organizations, such as the Cybersecurity and Infrastructure Security Agency.

Cybersecurity should be considered a critical component of your organization's infrastructure. Make sure you account for it in your Continuity of Operations Planning (COOP).

Protect your online systems with strong security measures

Adopt robust security measures to protect your websites and online systems. At a minimum, this should include:

- Multi-factor authentication: A security measure that requires users to provide two forms of verification (such as a password and a unique code) to access.

- Encryption: The process of encoding data to make it unreadable by unauthorized parties.
- Secure web hosting: Online digital assets such as websites, apps and application programming interfaces should be hosted and protected through a service that provides firewall, attacks prevention tools, bot detection, and real-time monitoring services.
- Local network firewalls: Security barriers that monitor and control network traffic, protecting against unauthorized access and filtering out potential threats from entering or leaving a network.
- Intrusion detection systems: Tools that monitor network activity to detect and respond to potential security breaches, identifying suspicious or malicious activities that could indicate unauthorized access or attacks.

These measures, combined with fundamental best practices such as use of HTTPS, password management, and regular system backups, can significantly reduce the chances of hackers accessing sensitive information through your digital systems.

Develop comprehensive security policies

Create and enforce robust security policies. This will establish clear guidelines and expectations for maintaining secure digital systems agency-wide. Policies should address areas like system access controls, password management, data encryption, incident response procedures, and regular system updates.

Conduct a security plan assessment.

Work with your employees to identify all of the digital systems currently in use, number of users, and loss of access impact. Make sure to catalog the purpose of each digital system and its value to the organization (i.e., operational, mission critical, or nice to have). Finally, identify the recovery time objective for each system after an outage.

Conduct regular security audits

Conduct a security audit at least once a year. These are essential for identifying vulnerabilities and gaps in online systems.

A comprehensive assessment will help you understand the effectiveness of existing security measures and detect potential weaknesses. There are online tools available to start this process. Vendors can perform more detailed audits.

Engage in cyber threat intelligence sharing

Actively participate in threat intelligence sharing networks. By collaborating with other government agencies and security organizations, you stay updated on emerging threats, attack trends, and countermeasures. Timely information sharing will help you be proactive in defending against cyber threats.

Mantras

- Security is not optional
- Security is everyone's job

Checklist

- ☐ Implement stronger security measures, using a consultant if needed.
- ☐ Foster a cybersecurity mindset by continuously training staff on digital security.
- ☐ Perform regular security checks on your systems and have backups.
- ☐ Hire staff or a consultant knowledgeable about cybersecurity and include them when making software selections.
- ☐ Audit your digital systems and make an action plan to address vulnerabilities.
- ☐ Include cybersecurity in your organizational Continuity Of Operations Planning (COOP).

Questions to ask

- What cybersecurity policies do we have in place?
- How are we training our employees to have a cybersecurity mindset?
- What type of security measures do our digital system providers have?
- What processes do we have in place to recover data after an attack or breach?
- Which of our digital systems are mission critical?
- How soon do our digital systems need to be restored after an attack or breach?

Learn more

- Shields Up: Guidance for Organizations, (Retrieved 2023, July 1), Cybersecurity and Infrastructure Security Agency
- Free Cybersecurity Services and Tools, (Retrieved 2023, March 1), Cybersecurity and Infrastructure Security Agency
- Guide to Cybersecurity Risk Assessment. (Retrieved 2023, October 9). Cybersecurity and Infrastructure Security Agency
- Partnering to Safeguard Localities from Cybersecurity Threats Toolkit, (Retrieved 2023, July 1), Cybersecurity and Infrastructure Security Agency.
- Have you Been Hit with Ransomware?, (Retrieved 2023, March 1), Cybersecurity and Infrastructure Security Agency
- Stop Ransomware Training, (Retrieved 2023, March 1), Cybersecurity and Infrastructure Security Agency
- Free Cybersecurity Tools: Test Your Users and Your Network, (Retrieved 2023, March 1), KnowBe4

Protect privacy

By Albert Gehami and Rob Lloyd

Overview

Many view privacy as another compliance exercise. In reality, digital privacy is about building trust in our responsible use of information. Governments and residents should understand what data are collected, how they are used, what controls are in place, and how residents can engage to create responsive community services.

The problem

Residents may reject technology when it isn't aligned with their priorities — like sensor-laden sidewalks in Toronto, San Diego's "smart" streetlights, and automated license plate readers across California. Invasive data collection has a history of harm, since it's been used to segregate communities, justify racial policing, and deport undocumented families.

When local governments don't partner with residents before collecting data, they risk justified public backlash. Governments are responsible for the outcomes of technology, not the intentions.

The solution

A commitment to digital privacy can turn the introduction of a new technology from combative ("why are you installing cameras?") to collaborative ("I want you to put cameras there to increase safety").

This requires setting principles, developing a policy that aligns privacy practices with community values, and then implementing that policy through organization controls such as procurement and project management. It also demands periodic improvements to policy and operational structure.

Context

Starting a digital privacy practice at your organization begins with:

- Establishing a risk-tiered privacy review
- Engaging residents on technology, data, and privacy
- Providing privacy education to agency staff

Establish a privacy program

Agencies should review every technology and data initiative from a privacy perspective. Appoint a dedicated owner — a privacy officer — who is part of the review process for all technology purchases and uses. Cities like San José and Seattle house their privacy programs under their technology departments in part because of their nexus with procurement, city operations, and policies.

The privacy officer will need to work closely with:

- Legal: to meet compliance and to incorporate privacy requirements into contracts
- Purchasing: to incorporate privacy requirements into purchases
- Technology: to ensure technical controls are implemented effectively

The privacy officer should also provide agency-wide education so everyone can identify what personal information is and knows who to go to for guidance (the privacy officer).

The privacy officer should be familiar with state and federal privacy laws and comfortable with data analytics. Critically, digital privacy succeeds when the organization sees the privacy officer as a productive partner in navigating legitimate issues to enable innovation.

Tier your privacy reviews by risk

Privacy reviews take time, so it is essential to quickly triage projects based on risk.

- Low privacy risk: involves no personal information or only personal information that is already public. This includes most standard equipment (printers, laptops), fully anonymous surveys, and using public data. Requires no further review.
- Medium privacy risk: involves identifiable information not traditionally kept hidden (e.g., name, email, phone number) to provide targeted government services desired by the data owner. Notice is provided at time of collection and often requires written consent. Requires a brief internal review.
- High privacy risk: involves identifiable information traditionally kept hidden (e.g., Social Security number, credit card number) that may provide targeted services or punitive services. Notice may not be provided upon collection or provided in a limited format. Requires a thorough review, a written protocol, and potentially public engagement.

Key questions to include in your review:

- What data is collected?
- Do residents know their data is collected? How do they consent?
- How is the data being used?
- Who has access to the data?

Engage residents on technology and privacy

For technology with high privacy risk and high civic benefit, a privacy-first approach to explaining the technology can build resident confidence and create a collaborative environment for responsible innovation.

The main topics to engage residents on include:

- Their day-to-day concerns, so the agency can identify the technology that can address them
- Their willingness to share their data for services
- “No-go’s”: activities that are against a community’s values

It is important to engage online, in-person, and virtually. Typically this includes a webpage with a feedback form, in-person discussions and surveys, and webinars. Focus in-person engagement on underserved neighborhoods in the languages they speak.

Mantras

- Privacy is about building trust
- Privacy enables equitable innovation

Checklist

- [ ] Start with principles true for your community.
- [ ] Translate those principles into policy, with controls at purchasing and budgeting.
- [ ] Prioritize initiatives worth a review based on their privacy risk tier (low, medium, high).
- [ ] Maintain a supportive review process that adds value to agency initiatives.
- [ ] Team with residents for the effort to be the most impactful and meaningful.
- [ ] Teach agency-wide privacy fundamentals and provide targeted education for frequent users of personal information.

Questions to ask

- How can you reach the residents who might be most upset with or affected by the technology?
- How can your agency invest minutes today to prevent a major privacy incident later?
- How can your agency store less personal information and get the same job done?
- How can you communicate why your agency collects data?

Learn more

- Privacy procurement review form for mid-risk projects, (Retrieved 2023, November 15), City of San José
- Data Usage Protocols for high-risk projects, (Retrieved 2023, November 15), City of San José (2021)
- Lecture: Dismantling the “Black Opticon”: Privacy, Race, Equity, and Online Data-Protection Reform, Anita L. Allen (2022)
- Core Values, Ethics, Spectrum — The 3 Pillars of Public Participation, (Retrieved 2023, November 15), International Association of Public Participation

Feed the machine

By Luke Fretwell

Coming soon.

Overview

The problem

The solution

Context

Mantras

-

Checklist

- [ ]

Questions to ask

-

Learn more

- Open Data Charter
- The 8 Principles of Open Government Data
- Schema.org
- Dublin Core
- Data Catalog Vocabulary
- DAMA-DMBOK® 3.0 Project

Manage data rights

By Joy Bonaguro

Overview

Governments must actively manage data rights when working with vendors and contractors. If not, unscrupulous vendors or contractors may hold your data hostage.

The problem

Vendors and contractors may claim ownership or other rights to public data. Depending on the contract terms, this can create problems. For example, some jurisdictions have lost access to their public data. Some vendors may attempt to retain your data even after the contract is complete. In the worst cases, data ownership problems may lead to a vendor claiming that the jurisdiction cannot use their data in another tool.

The solution

Ensure that contracts include terms that manage rights for data that you create, collect, and/or manage when providing a public service or function. Work with your legal and procurement team to review and update data terms. Include these terms in any agreement that involves the use of public data. This may include contracts with software vendors, service providers, and even consultants.

Context

Most vendors and consultants have fair and standard data terms. Yet each bullet below describes a real data problem from a jurisdiction.

- A vendor or consultant claims that they own your data. They don't allow you to use the data with another tool or vendor, e.g., constituent email addresses.
- A consultant claims that they only need to provide you with the summary reports of an analysis. They claim that they own the underlying datasets that they collected on your behalf.
- A vendor claims that they cannot extract your data from their software. Or they will only give you the data in a proprietary tool that they control.
- A vendor claims that the database design (e.g., table relationships) is their intellectual property, so they cannot give you the documentation. Without the database design, you are unable to analyze the underlying data.

You must manage your data rights to avoid these types of problems.

Protect ownership and access to your data

Many data terms exist for privacy, security, and data management. Data ownership and data access are the two most important data rights to manage.

Data ownership

Data ownership terms ensure that:

- Your jurisdiction owns your data
- Your data is only used for authorized purposes.

Do not grant public data ownership or intellectual property rights to vendors or consultants. Instead, retain ownership of public data when vendors collect, store, manage, or otherwise use data on behalf of your jurisdiction, as well as derivative works made from public data.

Do grant vendors and contractors the right to use public data to perform services per any contract or agreement. But you should forbid them from using the data for their own purposes or later use.

Data access

Data access terms ensure ready access to public data. This includes the ability to extract data from vendor systems for analysis, migration to other tools, and more.

You must be able to access and extract data from vendor systems. You should be able to access the data in machine-readable and non-proprietary formats, such as .csv. This lets your team use the data in common tools like Excel.

For data in a relational database, you should have access to the database design. This will help you and other service providers use the data for reporting, analysis, and systems integration.

You should also have access via an application programming interface known as an API. An API is a language that allows software and computers to talk to each other. Vendor APIs should be well-documented and maintained. This will support future interoperability with other systems.

Create standard legal terms

The learn more section provides links to resources with sample legal terms. Share this with your lawyers.

Mantras

- Public data is our data
- Ownership means access

Checklist

- ☐ Identify your jurisdictions' standard contract terms.
- ☐ Compare your jurisdictions' terms to the ones we recommend and identify any gaps.
- ☐ Meet with your legal team to review any gaps.

- [ ] Work with your legal and procurement teams to write new contract terms to close gaps.
- [ ] Ensure the terms apply to all agreements that involve public data, including renewals.
- [ ] If a vendor has similar terms, don't spend time and expense negotiating over exact wording.

Questions to ask

- What are your jurisdictions' contract terms?
- Do those terms address ownership and access to data?
- Who is in charge of editing your contract terms?
- Who is in charge of including terms in contracts negotiations?
- Which contracts do you need to amend to include your new terms?

Learn more

- Data Ownership and Usage Terms for Government Contracts, (Retrieved 2024, January 15), GovEx Labs at Center for Government Excellence

Upskill always

By Shira Honig

Overview

Successful government digital delivery depends on technology-literate employees applying digital skills and values to public service, from policy and procurement to product testing and upkeep. Sustainable training requires smart use of resources, continuous learning, and a culture of exploring, observing, and experimenting.

The problem

Continuous learning and experimentation are often not a priority in government. This may be because of a lack of resources, cultures that value complex policy and rule-following over continuous learning or experimentation, or leaders too overwhelmed to prioritize professional growth. Because technology is ever-changing, failing to improve leads to ineffective government digital services that people don't like and don't use.

The solution

Upskilling is the process of continuously learning new digital skills in a current role. Government best serves its community by building an upskill culture throughout the organization.

Adopt an upskill culture in technology where learning — and learning by doing — are valued, encouraged, and seen as assets for both individuals and organizations. Governments that prioritize tech upskilling through a variety of methods are better positioned to stay abreast of digital change, empower staff, keep employees, make smarter technology purchases, and better serve their communities.

Context

Prioritize upskilling

Upskilling starts with leadership. It thrives when leaders are proactive champions culturally and, when possible, financially.

Leaders do this by:

- Prioritizing some form of upskilling program
- Budgeting for training
- Allowing staff time to learn and apply their skills

Embrace openness

Digital values are key to an upskilling culture. One critical digital value is continuously working in the open, internally between teams or hierarchies, and between governments and communities.

Openness inspires innovation, increases transparency and accountability, grows civic participation, improves policy design and success, and elevates public trust.

Learn digital skills

Focus on respecting and understanding users when a policy or product is being developed, communicated, tested, adjusted, and implemented. Prioritizing user needs in government leads to the delivery of programs or services that people actually need, understand, and use.

Key digital government skills:

- Human-centered research and design
- Content design
- Data analysis and data science
- Product management

- Software development

Align to organizational goals

Choosing the right upskilling initiatives depends on the skills you need to achieve your goals.

Do you need to:

- Analyze complex datasets to support decision-makers?
- Develop websites that are clear and easy to read?
- Study your constituents to understand if a program or policy meets their needs?

Measure your baseline

Gather data on your organization's digital skills baseline. This will help you understand gaps where upskilling is needed.

- What skills exist and where?
- Are they beginner, intermediate, or advanced?
- What methods are currently used for upskilling? Are they working?
- Talk with and observe employees to learn their gaps and pain points.

Diversify learning

Upskilling initiatives depend on an organization's gaps, size, and culture. There is no one-size-fits-all solution, but variety is important, as is on-the-job application of new skills.

Upskilling methods:

- Peer training or staff exchanges
- Short-term courses (online or in person)
- Peer discussion groups ("communities of practice")
- Internships
- Crowd-sourced innovation

- Vendor demos
- Online resources

Always be upskilling

Technology is ever-changing. Applying a growth mindset to your digital skills will ensure you're always building better services for the people you serve.

Mantras

- Growth is a mindset
- Always be upskilling

Checklist

- [ ] Commit to an upskilling culture and digital values.
- [ ] Review your learning culture and skills baseline.
- [ ] Determine your goals and align on the skills you need to achieve them.
- [ ] Determine which teams may need which skills, and what, if any upskilling, should be required.
- [ ] Adopt a digital learning framework and try different upskilling methods.
- [ ] Continue measuring where you're at and trying new things.

Questions to ask

- Are we (leaders and staff) truly committed to an upskilling culture?
- Do people have the digital skills they need?
- How are we applying our learnings to our daily work?
- Do we share our learnings with one another?
- Are we regularly reviewing our digital skills? How are we staying up to date?

Learn more

- Understanding digital roles, (Retrieved 2025, May 10), Australia Digital Transformation Agency
- Resources, (Retrieved 2025, May 10), Digital.gov
- Denver Peak Academy, (Retrieved 2023, October 22), City of Denver
- How to upskill a team, (Retrieved 2025, May 10), Australia Digital Transformation Agency
- InnovateUS, (Retrieved 2023, October 22), Innovate(US)
- How upskilling impacts talent retention and recruiting, (Retrieved 2023, October 22), PwC.

Hack with the people

By Lori McNeill and Carlos Moreno

Overview

Open, collaborative solutions can help public agencies address civic demands in ways that are inclusive, transparent, and quickly respond to changes. Governments can empower communities and create better digital services by engaging skilled volunteers, embracing experimentation, and leveraging local technologists — or civic hackers.

The problem

Local governments face a growing demand for digital service delivery to diverse constituencies while struggling to keep up with emerging technologies. For many agencies, funding limitations present a barrier to creating and improving digital services. Governments may also have difficulty competing for qualified technical talent.

The solution

Municipalities have an untapped capacity of volunteers willing and able to help serve their local community. Engaging with civic hackers who have both technical know-how and the desire to help solve community problems creates connection, subsidizes innovation, and gives volunteers a sense of public service.

Governments that build a framework for continuously working with civic hackers can build sustainable, scalable digital services while creating a pipeline of technologists to fill government service roles.

Context

Civic hackers are creative problem solvers who enjoy exploring and understanding complex systems and frameworks. They are normal people — designers, technologists, policy wonks — that tinker alone at home or local library or coffee shop, or together at unconferences or through formal organizations.

They apply their skills — software development, user experience design, product, data management — to explore problems and create innovative solutions.

Often associated with cybercrime, in tech culture “hacking” means repurposing something (code, hardware, etc.) to creatively solve problems. Hacks emerged from an internet culture of building in the spirit of playfulness, resourcefulness, and collaboration.

Embrace the culture

You don’t need to know code or be a technology expert to engage with civic hackers.

Understanding and embracing hacking culture — curiosity and a willingness to share context and data — is an important first step in building a productive civic hacking ecosystem with your community. Ask questions and listen to feedback.

Find the hackers

Hackers can be found in a number of places:

- High school computer clubs
- University computer science labs
- Makerspaces
- Local/national organizations

Explore civic hacking

Civic hacking projects have inspired and directly impacted many digital government efforts.

Examples:

- Improving housing assistance online applications
- Automating court notification text messaging services
- Mapping community needs such as transit and supportive services
- Leading citizen science projects using sensors to monitor water quality and other local environmental factors
- Building dashboards to visualize public safety and policing open data

Some civic hacking projects, such as Chicago's Million Dollar Blocks, Open311, and the state of California's application for food benefits, GetCalFresh, have evolved from ideas to robust digital government services.

These examples share a common element in their origin stories: the willingness of government leaders to engage beyond bureaucracy in hands-on problem solving.

Hack around, find out

Successful civic technology efforts take a holistic, sustainable approach, where government fosters a framework for continuous collaboration and problem solving.

Civic hacking projects start with public conversations:

- Policy presentations by elected officials
- A public board where residents can list needs on a map
- A "reverse town hall," where residents speak on a specific neighborhood issue and public officials listen
- A "show and tell" of data visualizations

After community discussions about what challenges to tackle with a team of civic hackers, implement a plan for delivery. This includes:

- Extracting, sanitizing, publishing government data
- Using digital tools to collect community feedback
- Sponsoring an open innovation challenge
- Hosting regular meetups and hackathons

It may be tempting to scope a fully-fledged project from the outset, but collaboration takes time. Set expectations, acknowledge limitations, and break large projects into milestones. Think small and iterate.

Celebrate hackers

Recognize hacker contributions as you would other volunteers in your community:

- Issue proclamations.
- Give out awards (like the “Key to the City”).
- Have them present projects at council meetings.
- Share stories on social media or newsletters.
- Create a monthly or quarterly showcase of ideas and solutions.

Governments that embrace civic hacking find it has a multiplier effect on engagement, community-driven solutions, and digital transformation.

Mantras

- Open mind, open door, open tech
- Hack with the people

Checklist

- [ ] Learn about civic hacking and hacker culture.
- [ ] Identify problems that make sense for hackers to help with.

- ☐ Set and manage expectations.
- ☐ Create space for civic hackers to support openness and innovation.
- ☐ Provide context and data.
- ☐ Celebrate successful collaborations.

Questions to ask

- How can we prepare to answer questions and engage around changing demands?
- What constituencies, demographic groups, or neighborhoods are we not hearing from?
- What gaps in our digital capacity or skills could be bridged with community volunteers?
- What tech meetups, data researchers, or community organizers in your community can we leverage?
- How can we better prepare to work with volunteers?

Learn more

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- Building a Civic Hacking Community, Civic Hacker Network, (2020, September, 10)
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- Civic Tech: Making Technology Work for People, Andrew Schrock (2018)
- A Young Civic Hacker Could Be the Next Generation of Gov Tech, Paul W. Taylor (2023)
- Alliance for Civic Technologists

Clean the cruft

By Lenae Storey

Overview

Every government solution — whether a policy, procedure, service, or system — follows a lifecycle. Gradually, these solutions become outdated, no longer solve the right problem, or bogged down by aging processes or technology. Deprecation is a systematic way to phase out these unused or outdated solutions so government works better.

The problem

Instead of proactively retiring ineffective or outdated solutions or operating models in government, we layer new ones on top to meet new mandates.

Over time, this creates layers of "cruft" — the gradual build-up of redundant and arduous systems and processes. Cruft can be incompatible technology, outdated requirements, duplicative processes, or PDF forms with fax cover sheets. The result? Rising costs, overburdened staff, slower response times, and the erosion of public trust in government institutions.

The solution

Deprecation helps government teams proactively address the buildup of old processes and technology and replace them with better alternatives. Deprecation doesn't mean the solution no longer works — it means there is a more effective or sustainable way to deliver our missions. It ensures continuity, backward compatibility, and gives people relying on the old solution time to adapt to new options. Deprecations are a key part of continuous improvement and iterative delivery of services and programs.

Context

Without intentional deprecation, improvement stalls. 80% of federal IT budgets go to maintaining legacy systems. State offices waste valuable hours each month on outdated, manual processes. Then we spend even more on large modernization projects that repeat the cycle.

Deprecation as a solution

Deprecation should be a natural part of solution lifecycle management. Deprecation doesn't abruptly remove solutions. Like pruning a tree, deprecation removes obsolete governance policies or technology that hinder growth so systems stay relevant and responsive.

What to deprecate

Deciding what and where to deprecate is as critical as deciding what to build. Deprecation can apply across all levels of government and solutions, from the smallest software components to overarching policies.

1. At the component level: phasing out outdated logic within a software codebase to make way for upgraded or more secure alternatives.
2. At the feature level: removing unused functionality that consumes limited resources allows teams to focus on value-adding features.
3. At the service level: identifying and gradually eliminating workflow friction by streamlining to more outcome-driven processes.
4. At the rules level: retiring cumbersome procurement documentation requirements in favor of sandbox and prototype assessments.

While deprecation is possible at all levels, the feasibility, impact, and risk differ as you move from technical to organizational levels. Make decisions based on a solution's ability to fulfill its intended purpose and deliver the right outcome.

When to deprecate

Deprecation isn't usually tied to specific timelines. Deciding when to deprecate depends on a solution's relevance and effectiveness throughout its lifecycle.

Generally, it's time to deprecate when:

1. A solution is not being used and provides little to no value
2. A significantly better alternative exists
3. The solution is outdated, causing issues and consuming resources
4. The solution is dependent on an underlying technology (like an operating system) that you're already deprecating

Teams should set baseline metrics to evaluate the need and timing for a deprecation. For example, you could track baseline metrics like application completion rate, user satisfaction, and uptime performance for a system that has remained unchanged since launch. When the system doesn't meet those benchmarks, teams can spot what needs improving or deprecating.
You must evaluate the potential timing and impact, whether quickly deprecating an unused feature or phasing out a widely used program.

How to deprecate

Start by understanding the problem and current state using user-centered research methods like interviews, feedback analysis, and service or dependency mapping. Revisit the original solution or program's vision to ensure the new solution better addresses the original need.

Create a deprecation roadmap with clear milestones and feedback loops to minimize disruption. Roadmaps should account for offboarding users, staff, and stakeholders from the existing solution to alternative options. Include a communication plan with stakeholders explaining why the deprecation is necessary and highlighting key benefits of the new alternative.

Integrating deprecation into your delivery approach can help you respond to growing complexity, reduce costs, and future-proof existing solutions.

Deprecation isn't just about removing what's old or unuseful — it's about intentionally creating room for what's better.

Mantras

- Deprecate to gain, not lose
- Deprecation is progress

Checklist

- ☐ Conduct discovery to learn about the current solution's value, usage, and dependencies to inform decisions.
- ☐ Evaluate the impact of deprecation, assess risks, and develop mitigation plans.
- ☐ Set criteria for a new solution and define success metrics and transition requirements.
- ☐ Create a roadmap for a phased deprecation plan with milestones and a user transition strategy.
- ☐ Set a strategy by appointing a primary owner, aligning supporting teams, and getting stakeholder buy-in.
- ☐ Announce changes so users, stakeholders, and teams understand what's happening and how to adapt.

Questions to ask

- What need does the current solution address, who uses it, and how often?
- What teams, services, or systems depend on this solution or process?
- Is there a significantly better alternative and can it scale better than the existing solution?
- What is the impact (including costs and risks) of keeping the current solution versus retiring it?
- What does a successful and safe deprecation look like for our users, stakeholders, and partners?

- What is the long-term vision for this policy, process, or solution, independent of the current state?

Learn more

- Cutting Through "Policy Cruft," Ben Bain & Christine Tsang (October 30, 2024), Niskanen Center
- Kill It with Fire, Marianne Bellotti (2021)
- An introduction to decommissioning sites, (Retrieved 2025, March 24), Digital.gov
- The How We Need Now: A Capacity Agenda For 2025 And Beyond, Jennifer Pahlka, Andrew Greenway (December 2024), Niskanen Center

Inspiration

Spark community joy

By Kirsten Wyatt

Overview

Local government work is essential yet humble — services are used constantly, yet recognized rarely. Showcasing and celebrating local government services builds a foundation of community pride and creates a culture of service and professionalism.

The problem

Public trust in government remains low. Partisanship deadlocks Congress and family dinners. Social media's toxicity on anything from public schools to the presidency stifles any fun these platforms used to bring.

When the world of public service feels like a sucking cesspool of anger, going into work each day, let alone trying something new, becomes difficult. This is why it is important to find joy if we are to build community pride, maintain essential services and retain the talented people who work in government.

The solution

Celebrating, showcasing, and finding joy in our communities brings happiness to local government staff and community members, which allows us to refocus on the essential services that local governments provide. Even the most hardened skeptic will see immediate benefits when we tell stories about the wonder, importance, and context behind local government services. Humanizing local government reframes public service work to truly be for the people, by the people.

Context

Unlike federal or state governments that can seem like faceless bureaucrats in far-removed capitals, local government employees are just down the street. The first step in finding community joy is in humanizing local government.

Tell a story

Tell the stories behind the work.

Human interest stories abound in service departments. Programs like “Touch a Truck” or time-lapse construction videos take the exciting parts of major work and bring them to life. Human interest stories abound in service departments.

Local media is stretched thin, so proactively send blurbs and photos. Work with bloggers to showcase resources and programs. Once you’ve put a human voice to government operations, tell a story about the critical work your agency is doing every day.

Many public services are out of sight, underground or only on-demand. Talking about critical services like clean water, safety, and economic development affirms their importance. Share a story about a process improvement that saved time and tax dollars. Or, share pictures about how excited kids are when a new playground opens.

Talk like a human

Language

Plain language humanizes government. Use words that you’d say over coffee with a friend. For example: “kids” instead of “youth.”

Culture

Use local and pop culture to make government work relevant. For example:

- Turn on Google news notifications or sentiment trackers to find out what's happening locally.
- Tap into school pride and partner with mascots.
- Use government social media to share local interest stories.

Personality

Every employee has a connection to the community through their job. Introduce them via profiles that spotlights them and their work. This humanizes the people providing public services, while giving a professional snapshot of your employees.

Impact

Daily tasks can obstruct the larger mission. To spark joy internally, put work in a larger context. A budget analyst is not just populating spreadsheets — she's managing funding for the new water tower. A library clerk isn't just shelving books — he's supporting youth literacy. Emphasize impact to stress the importance of routine tasks.

Have fun

Engaging Local Government Leaders (ELGL) celebrates "City Hall Selfie Day" every August so local governments can share their pride for public service. Participation is easy: just snap a picture in front of a local government building and share it with the hashtag #CityHallSelfie.

In 2022 #CityHallSelfie had more than 2.5 million social media impressions. It's a reminder that finding joy in public service does not have to be time consuming or expensive. It can be as simple as a selfie to reframe community pride in the work we do.

There's also a business case to spark joy. When community members believe in their local government, we increase volunteerism, trust, and support for initiatives.

Finding joy uplifts and retains talent. The days of working somewhere for 30 years are over. Employees job-hop, looking for positions and organizations that fit their lifestyle, interests, and mission. When we make work fun, we improve the likelihood that we can keep talent in our communities. This improves service delivery.

Mantras

- Spark community joy
- Always maintain only a joyful mind

Checklist

- [ ] Look outside — celebrate the whole community.
- [ ] Talk like a human — implement a plain language policy.
- [ ] Be a storyteller — explain why local services matter.
- [ ] Keep it simple — small efforts can spread big joy.
- [ ] Humanize staff — introduce employees and their work.
- [ ] Have fun — life is too short to get mired in bureaucracy.

Questions to ask

- Where are community conversations happening?
- What makes your community proud?
- What services are largely unknown yet critically important?
- Who are trusted messengers in the community? On staff?
- How is the community receiving information? What languages are they speaking? What channels are they using?
- What makes the community special?

Learn more

- City Hall Selfie, (2022, April 20), Engaging Local Government Leaders
- Plain Language, (Retrieved 2022, April 20), PlainLanguage.gov
- Be Who You Needed When You Were Younger, Kirsten Wyatt (2018, August 29)

- Work Hard, Be Kind, (2021, July 1), Engaging Local Government Leaders

Remember why you do this

By Marlena Medford

Overview

Driving digital change in government is daunting. Yet, we push because we know our government needs fixing, now. This conviction carries us most days. But when it falters, we have to remember what drew us —and what's at stake if we walk away.

The problem

Public service demands compassion. We see people's struggles and we're trusted to help ease them. Sometimes, dated, flawed systems stand in the way of citizens and the public servants trying to help them. Over time, our compassion can be tested and worn down.

When the people who keep our systems running — whether they're government leaders, public servants, community volunteers, or vendors — become hardened or cynical, we all lose.

The solution

We all have a reason — or several — we wanted to tackle the herculean task of improving public service. Something fired us up to do this hard work. Reminding ourselves of the initial spark is a balm when motivation runs low.

We also have to grant ourselves grace. Real change takes time, and there will be bumps along the way. When setbacks happen, we can't lose sight of the mission—or the people counting on us.

Context

Digital leaders evangelize change in a sector that defaults to the status quo. While technology is not a panacea, it can help us push the government to change the way it solves problems. We're working to put people's needs at the center of government services, which frankly, isn't standard.

Our work isn't always easy, and it isn't always recognized. Watching systems fall short for the people who need them most can weigh on us. But still we show up, we dig in, and we keep going — because the challenges are real, and so is our belief that together we can build something better.

We can't lose heart. Building something better takes all of us staying open, hopeful, and committed to serving with heart. Apathy robs us of compassion. We have to genuinely care about people's needs if we're going to build people-centered services.

Keep the faith

When the challenges pile up, we have to remember what attracted us to this work. We chose public service because we want to help people in tangible ways that scale. We have to remember that it'll take time to see it through in earnest.

We also deserve to remember our wins — no matter their size. Transforming bureaucracies happens in countless strides, some of them baby steps, some of them major leaps.

Even if you didn't reach your goal, ask yourself where you gained some bit of knowledge that'll help later.

For example, *Power to the Public* authors Hana Schank and Tara Dawson McGuinness spotlight the State of Vermont's effort to modernize how people apply for benefits. Through a small pilot program, the State transformed a paper-application process to a fully-automated version. It cut benefit delivery time in half.

Despite the success, the pilot project wasn't adopted at scale (or at least that's true at the time of this writing). This was due to a lack of internal support coupled with the pandemic.

Though it's disappointing, there are plenty of wins. For starters, it's a testament to what's possible when change is piloted in small batches. It also taught staff the value of demoing prototypes to earn buy-in. These are lessons that'll surely benefit future projects across government.

As author Mitchell Weiss so aptly put it in *We the Possibility:* "We get the government we invent."

We need inventors who have the conviction, compassion, and courage to take on the fundamental problems in how we deliver public services.

We need leaders like you who, despite the hard work, will persist for the public good.

Mantras

- Persist for the public good
- Where's the win?

Checklist

- [ ] Acknowledge the enormity of improving public service — and accept that change won't happen swiftly.
- [ ] Look for the lesson learned or small win, even if a project fails.
- [ ] Remember why you were drawn to public service, and remind yourself often.
- [ ] Use "your why" to stay compassionate, curious and committed as you serve the public.

Questions to ask

- What drew you to public service?
- What have been some of your wins, no matter how small?
- How are those wins informing your work now?
- What items are in your control, what items are you not? Evaluate this list regularly.

Learn more

- Power to the Public, Hana Schank and Tara Dawson McGuinness (2021)
- We the Possibility, Mitchell Weiss (2021)

About

Proudly Serving is a guide to building people-centered public services.

How we made this

Proudly Serving is an open civic organization. We work this way because it's more fun and makes us better.

The project is managed openly on GitHub, led by maintainers and supported by contributors. We follow a team agreement and code of conduct. All content is available under an open license. Details on how we work can be found in our documentation.

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