

Playbook for setting up a design governance body

Introduction

Acknowledgement and thanks to the teams involved in establishing the Trace Service Design Authority; that work and experience underpins the development of this playbook.

The playbook is intended to step through the considerations and discussions that will help shape, organise and develop engagement with this body.

It's probably best used over time, not in a single session.

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Some of our thoughts about design governance:

What is design governance? Our view is that it means a framework and an agreement about who gets to make design decisions, what design aspects they can make decision about and who is accountable for those decisions.

What do design decisions look like and include?

They could include:

- approving, rejecting or amending designs in an end-to-end service where there are multiple products in scope, and perhaps several product owners involved
- helping provide expert review of design decisions where there are tough choices to make – e.g. perhaps where you face financial or technology constraints, and need to consider alternative options or phasing of design implementation
- checking how far design guidelines, principles and standards have been followed
- identifying and discussing where there are differing views or opinions on what data and user research is telling us about a service design

That's the theoretical context, here is a playbook to help design or iterate a design governance body. We'd love to hear from you about how it goes.

Your current design governance context

What is the current state? What kind of design governance exists?

At product level

At service level

At programme level

At another level

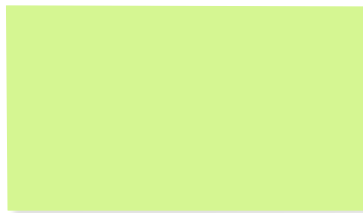
What other types of governance cover product and service development (and operation)?

Do a mini-retrospective of the current state

What works well in the current state?

What doesn't work well in the current state?

What should be the purpose(s) of your design governance body? For example: ensuring that products and services meet user needs, are delivered to service standards, are aligned with strategy, business and policy objectives, public health objectives



Who will attend the sessions?

Suggested approach for this section

1. Populate the "Permanent members" and "Other attendees" team with the names or roles that you feel should be part of the design governance body

Permanent members

2. Decide what the quorum for a session should be, the minimum representation of the permanent members
(Copy roles from permanent members)

3. Who will be the chair(s) of the body?

Other attendees

Consider when they'd attend

What is the scope?

What is the intended organisational scope?

Examples: organisation-wide, one directorate, several related directorates

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What kinds of product and services should be

considered? For example: digital, non-digital, operational, external-facing, internal-facing

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What should the governance body be looking for in the work considered? Examples: evidence of a user-centric approach based on testing and evidence; inclusive and accessible approaches and outcomes, integrated end-to-end thinking and design

Are there standards, design principles, vision statement, strategy documents that should be guiding consideration?

When should work come to the design governance body?

What should "trigger" the need to present to the design governance body? Examples: exiting stages in the delivery cycle, e.g. Discovery, Alpha; delivery points requiring a significant decision; changes in design with a significant or impact on an overall service

Should there be different kinds of sessions?

Examples: review and approval sessions; advisory/informational sessions

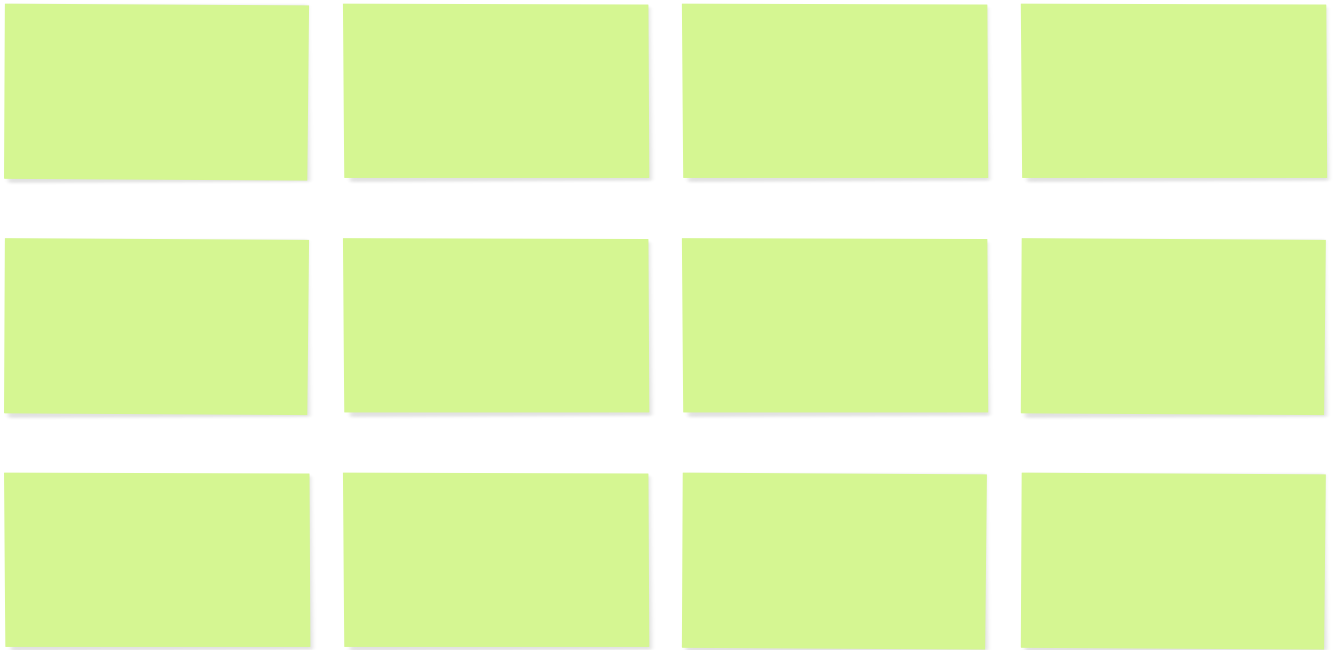
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How does this new design governance body fit into the overall governance and delivery ecosystem?

Create a diagram showing the flow/relationships.

Examples include technical design authority, demand board, delivery teams, design team, working groups

What materials or templates will the design governance body provide to teams presenting? Examples: presentation templates for different stages or contexts; lists of suggested questions to answer; session request template



What kind of details will these templates ask for?

See below for an example

Discovery session template:

- Problem statement
- Service aims and objectives
- Key stakeholders
- Assumptions
- Known unknowns and plans to address them
- Users and their needs
- Other impacted groups
- Equity and inclusion considerations
- Design hypothesis and approach
- Business change requirements
- Technical feasibility assessment
- Potential KPIs and metrics

Another template / material

Another template / material

How should decisions be reached and what authority will they have?

What level of agreement is needed for a decision?

For example: majority, 2/3 majority, unanimous

What happens if approval isn't agreed? Examples of potential scenarios: ask/require the product/service team to return with further information; escalate to a senior leadership body; recommendation of other actions

What will success look like for the new design governance body?

Suggested approach

- Start by discussing what success would look like
- Follow by indicating some metrics that could be used to measure success

success:

potential metric:

success:

potential metric:

success:

potential metric:

success:

potential metric:

success:

potential metric:

What are your next planning and organising steps?

What do you still need to know? What discussions do you need to have? Who do you need to talk to next?

How will you build engagement when you are ready to launch?
