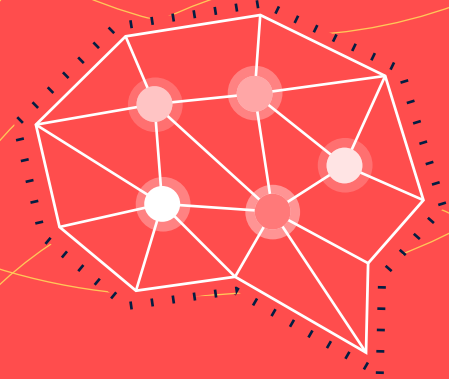


**EXERCISE**

# Collective Intelligence



[CDSO Toolkit](#) → Facilitation Tools

**The [Digital Service Network](#) (DSN) frequently uses a “collective intelligence” exercise to facilitate conversation and collaborative brainstorming for DSN Communities of Practice. This model uses a set framework for issue identification, questions and answers, group consultation, and resolution.**

This exercise is illustrated using anonymized exercises from the April 2024 Chief Digital Service Officer (CDSO) convening, hosted by the Beeck Center for Social Impact + Innovation’s Georgetown University. Reprints of the exercise slide and these instructions may be used with full attribution to the DSN.

## MATERIALS



### OVERVIEW DECK

[Google Slides](#)

## NOTES

- +** Depending on group dynamics, you may either solicit challenges and opportunities in advance, or in real-time when your group meets.

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- +** A key component of this exercise is sticking to the time limits for each section.

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- +** We suggest that you take notes when completing this exercise to assist the volunteers with any follow-up they wish to pursue. Anonymized notes are preferred to protect the confidentiality of participants.

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## DIRECTIONS

- 1** **Pose the Challenge: A person volunteers to share a challenge and presents it to the group in the form of a question. (5 min)**

When posing the challenge or opportunity, encourage the volunteer to provide enough detail to describe the situation, sticking to the five minute time limit. This ensures that the description does not ramble with unnecessary details.

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- 2** **Q&A: Attendees ask questions about the challenge. (8 min)**

Encourage attendees to only pose questions for the volunteer to answer briefly. This question-and-answer portion is essential to help the volunteer discern the core questions that arise from the challenge or opportunity. And, it is beneficial for the full group to ponder the questions that are posed as it relates to their own organization.

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- 3** **Consultations: Attendees share their advice for addressing the challenge. (10 min)**

Attendees may take turns offering their suggestions to address the challenge or opportunity. Encourage attendees to directly address the volunteer's situation – this is not a time for storytelling about similar situations in an attendee's own organization.

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- 4** **Commitments: Volunteer reviews advice and decides on potential next steps. (2 min)**

The volunteer should state the commitments they plan on making to address the challenge or opportunity. While there is not a firm deadline to complete these commitments, encourage the volunteer to be realistic about what consultations they may put into practice.

## EXAMPLES:

These examples are from a collective intelligence exercise hosted for the CDSO Community of Practice in April 2024. These notes are anonymized and are not attributable to any organization. The use of “agency/department” is intended to make these examples relatable and scalable to any form of government.

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## PROBLEM / OPPORTUNITY #1

# Evolution of Digital Service Business Model

### Step 1: Pose the Challenge

*Should we pursue a cost recovery model to ensure stable funding for a digital service that is sustainable and resilient that can withstand administrative changes?*

### Step 2: Q&A

- What are your agency’s revenue possibilities?
- Do you use a charge-back model?
- Do you own any services that you could charge for (e.g. a website domain)?
- What funding and business models have you leveraged before?
- What is your value proposition to agencies to work with your team?
- Do agencies/departments you work with own their own systems, or are they centrally located with your digital service team?
- Do you have a way to generate (and share) return on investment or cost savings as a result of working with your team?
- How does working with your team compare to vendor costs? Have you done a market evaluation?
- How much are you chasing after agency/department partners, or are people coming to you for your services?
- What is your IT team’s revenue model and what do agencies like and hate about it?
- Why now - why are you pursuing this question at this point in time?
- If agencies/departments are going out to bid for technical services, are you able to see those RFPs and have a say in procurement processes?

### Step 3: Consultations

- Develop a cost recovery calculator so you can communicate the benefits of working with your team.

- Have conversations with biggest digital champions and detractors, and then use the information you learn from them to help tell your story about why your work is impactful.
- Host conversations with elected officials and appropriators so they understand how your work is funded and what work you are doing.
- Consider finding a way to bid on RFPs for professional services; propose a solution and get the funding that way, versus a vendor. This will also give you visibility into the projects of other agencies/departments.
- Another option for RFP reform is right of first refusal - if an agency/department issues an RFP for a service you can provide, then you can “win” the bid to do the work.
- Consider a cost recovery model where your team can only build what you charge for, and agencies/departments plan ahead and add digital service to their budgets
- It is always a good idea to provide a menu of funding options to give yourself as many options as possible. For example, offer cost recovery through chargebacks, bake it into a budget, get into a capital planning process.
- Practice the elements of human-centered design - learn from elected officials and cultivate that education so you understand the language you’re using, and why it is important.
- Engage agency/department communicators or hire a position with bandwidth on the team for the “fireworks factory” to help cultivate political relationships/capital for projects that are important for the key stakeholders.

#### Step 4: Commitments

- In exploring the cost recovery option, we will practice what we preach and conduct user research time with potential agencies/departments; centering a human-centered design approach.
- And, we will continue to reflect on how the digital service team can better position ourselves into the money pipeline in different shapes and forms - both through relationships, and through system changes (i.e. reviewing RFPs, bidding on them etc.).

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## PROBLEM / OPPORTUNITY #2

# The Best Way to Say Goodbye

### Step 1: Pose the Challenge

*After our digital service team members have completed their tour of service, what’s the best way to say goodbye and transition a project?*

### Step 2: Q&A

- Is your current model of deploying digital service talent to a service delivery agency/department a sustainable model for your team?
- What are the 1-3 things you have the most concerns about? [Julia]
- Where do people land when they leave the team?
- Do you have an exit interview and what does it look like?
- When you look at the tour of service model, was that part of the original justification for the office? What would your stakeholders think if you pivoted to a different model?
- If team members are enjoying their tour of service, can they renew for more time with the department?
- If you had to change anything about the 2 year tour of service system what would you change?
- Is there a methodology that's being documented so you can learn from each transition?
- Do you have an explicit alumni community of former employees you can engage and learn from?

### Step 3: Consultations

- Your agency may be shifting from the founder/startup mindset to a scale mindset. Perhaps look into ways to document this adjustment so every new employee isn't recreating the same learning lessons over and over again.
- If the interest is extending the tour of service length, begin to articulate the cost of hiring, recruiting and getting people up to speed. This focus on commitment escalation and getting people to stay longer makes the investment in hiring and onboarding lower per person.
- Conduct exit interviews and operationalize that feedback so you are learning with each person who leaves the agency.
- Use a human centered approach and document it so you are continuously improving your onboarding and offboarding experiences.
- Consider a model where a shorter term tour of service could be a pathway into longer term employment with an agency/department.
- On the agency/department side - continue to ask for and document their feedback as well about what happens when someone leaves and someone new is onboarded. Question to ask, "how do we continue to have an impact after [person] leaves?"
- Embrace the churn – you're hiring people who might not otherwise sign up for a long-term role in government.

### Step 4: Commitments

- We will look into the idea of cultivating a landing page in the government for people whose tour of service is ending. This is a great way to continue working with agencies/departments and retain talent.
- We also will learn more about the exit interview and how to operationalize the things we hear from those conversations. It is important to be directive and understand where individuals want to go, and how to help people exit with dignity.

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## PROBLEM / OPPORTUNITY #3

# Marrying “Digital” & “Process Improvement”

### Step 1: Pose the Challenge

*How do I include “service design” as a core function of our work - our department title is “digital” and some people just see it as technology; how do I marry digital and process improvement?*

### Step 2: Q&A

- Are there other government departments that do service design? Are service design and process improvement currently siloed?
- Do you have capacity to build storytelling into this so people can understand what you do and what your vision is?
- Has your agency/department provided practice/training of Lean Six Sigma in the past?
- Are metrics of success defined?
- Is it possible for the service design team to do process improvement training?
- Are there existing projects between service design and process improvement where there is overlap?
- Has your leadership set strategic goals for this function?
- Do you have a formal intake/evaluation process for projects this team will undertake?
- Does agency leadership align with your vision that technology should be part of process improvement?
- Have you explored using a social vulnerability index to hone in on how to show impact?

### Step 3: Consultations

- Partner digital best practices with process improvement trainings so the combination of the concepts is built into the learning process.
- Incorporate end user outcomes into process improvement trainings and expectations for process improvement work.
- Find ways to empower designers to work collaboratively; don't allow training to be broken into silos and give the false sense that only some people need to think about end user outcomes.
- Consider communications and storytelling so stakeholders see that building in and measuring user experience is important.
- If people are attending Lean Six Sigma for projects they want to solve and have identified projects, consider developing some listening opportunities so your team can learn more about the types of things that need solving or attention.

- Find those feedback loops to build service design around. By doing service design with users you create a feedback loop and that drives service delivery. It sets up an expectation of listening to people first.
- Consider setting up a technical liaison/advisors process where you meet with teams once a month to learn what's on their radar or 'we want to talk to you about x.'" Show that the feedback loop is real and impactful; convene different people that may not have had conversations otherwise and surface challenges/areas for collaboration more organically.

#### Step 4: Commitments

- We will find ways to ensure that people doing two separate types of work are forming an informal, organic community around this work - which is aligned in making government services better and more accessible for the people we serve.
  - And, we will begin thinking about clear metrics and so we can define what "success" looks like, as we also continue to identify departments that would benefit from our work the most.
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#### PROBLEM / OPPORTUNITY #4

## Building Capacity For a CMS Migration

### Step 1: Pose the Challenge

*We are implementing a new content management system (CMS) - how do we develop a template for a basic digital team that every agency/department should have to make CMS implementation successful?*

### Step 2: Q&A

- Do you need to hire new employees within each agency/department to do this, or is it training up existing employees?
- When you're talking with leadership about this now, what are the top three reasons that they are saying you can't move forward with forming these teams?
- Who is driving the website change? Do other departments/agencies see it as a priority?
- Is there a consolidated view of the priorities?
- What are the pros/cons of each agency having a team?
- Is there a leadership sponsor - someone at the top who is advocating for this?
- Do you have any failure examples you can use to incentivize why action is needed?
- What happens if a department/agency doesn't have the resources to do the migration?
- Who ultimately do you need to convince to allow hiring?

### Step 3: Consultations

- When considering hiring into new roles, you may not need all of those roles at the same time in every department/agency. You could consider a fellow model to work on a project for x amount of time in x agency/department.
- Or, could be a savvy political move to create apprenticeships from local schools. That shows a workforce pipeline element and also a way to build partnerships with local institutions
- Framing and sharing the realities of cyber vulnerabilities and showcase how websites can make the agency/department vulnerable to frame why you need buy-in and support.
- Develop strong relationships with agencies/departments who support your work and can co-champion to show value from what you're recommending and deploying.
- Create adaptive models where you are assisting at both the department/agency level, and from a centralized vantage point. You can show that you're willing to step in and help in whatever model works for them (and ultimately, will result in a better outcome for you).
- Keep department/agency strategic goals in mind, especially for how it meets particular goals for other departments.

### Step 4: Commitments

- We will find ways to involve stakeholders more – especially love the idea of highlighting customer stories; our elected leader has prioritized customer service. Will also look into specific examples of users of services of the website, and showing videos of people accessing information etc. to highlight the need
- And, will look into a hybrid model - rather than trying to get everyone on board with one staffing model, we can think more broadly about how we resource and help those that are interested, but also then resourcing centrally if needed.

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## PROBLEM / OPPORTUNITY #5

# Scaling Human Centered Design

### Step 1: Pose the Challenge

*Is it feasible for the agency/department's entire IT organization to function according to human centered design? Or is that just the purview of a digital service team?*

### Step 2: Q&A

- Would including the IT organization in your work be a way to advance your broader mission (to use human centered design best practices to deliver services)?



- What is the variability of the technology stacks you are building against and need operational support for?
- What is the CIO's perspective on this? Other leadership in the organization?

### **Step 3: Consultations**

- You could consider a customer-experience side and a technology side (infrastructure, networking, cybersecurity). And then figure out where data would live.
- If you have the support of leadership, then call your shot and just make sure that you want what you ask for - because you just might get it?
- To address working with vendors, consider creating a master services agreement to break up the awards to vendors so you have control over task orders on a quarterly basis.
- Another consideration is developing your product management practice across agencies/departments. This type of capacity building ensures that project hand offs are successful.
- A more centralized model would empower you to start with a website built by a vendor and then handed off to agencies/departments. You would still rely on IT to maintain the platform but could then work with agencies to support development, deep accessibility review, risk management, etc.

### **Step 4: Commitments**

- We need to find that balance between outsourcing and building capacity within our own teams.
- A short term goal will be to figure out what goals and direction are for our digital service team, and then show (don't tell) about successes using human centered design to get small wins and continue to stretch and grow.