

# How to Provide People-Oriented Services:

A GUIDE FOR STATE & LOCAL PUBLIC SERVANTS

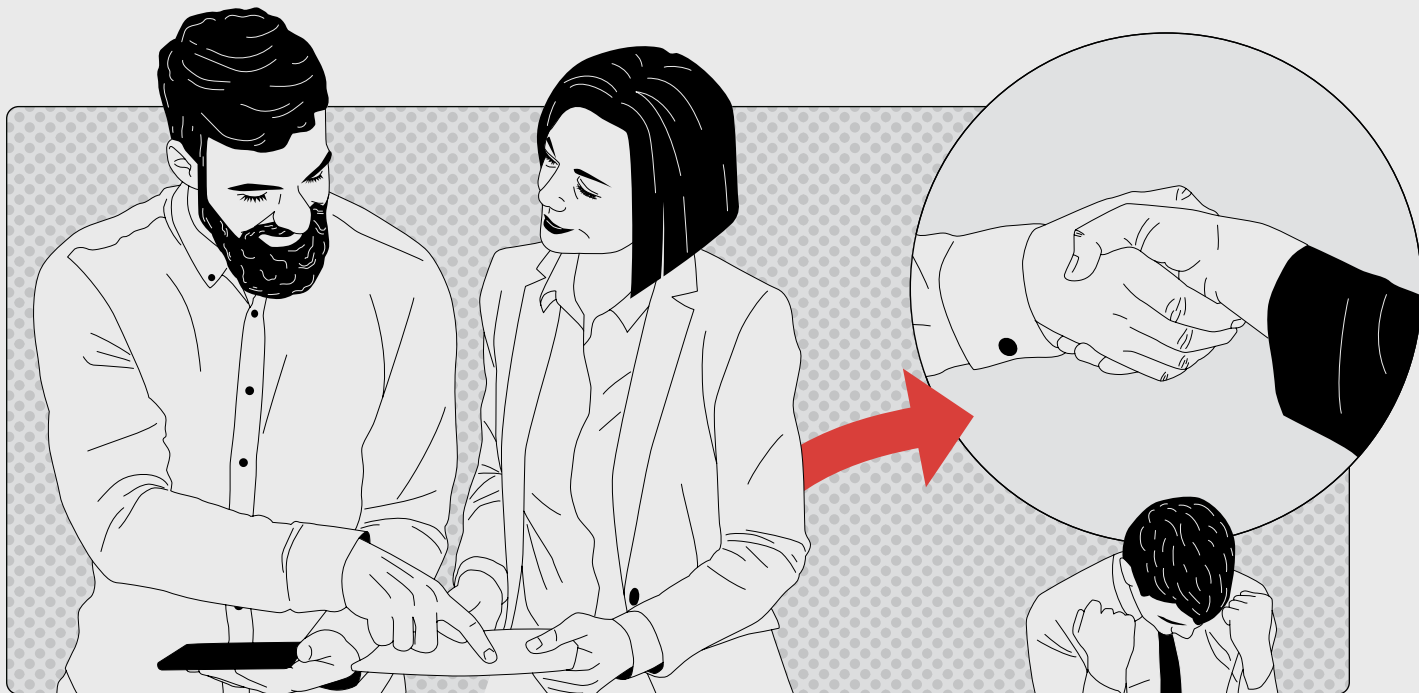


Figure A

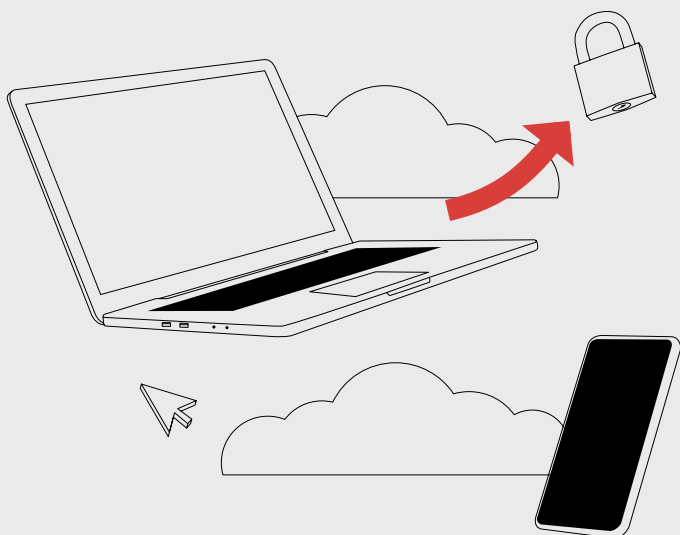


Figure B



Figure C



## 3

### ***How to Use This Guide***

An introduction on how to get the most out of this resource

## 4

### ***The Big Picture***

What are “digital services”? Plus facts and figures on their future

## 7

### ***From Peer to Peer: How Do You Do It?***

Hear from public servants themselves on their journeys to delivering digital services from three main lenses:

- ✚ Resistance
- ✚ Inclusion
- ✚ Morale

## 16

### ***Technology 101***

Best practices on how to use and manage technology for people-centric services

## 21

### ***Conclusion: Next Steps***

Sending you off primed for action

***“It is infinitely easier on the soul and the conscience and the psyche if you come to this gig thinking, ‘I am here to serve.’”***

– Aaron Snow, Faculty Fellow at the Beeck Center for Social Impact and Innovation, Co-founder of 18F, former CEO of Canadian Digital Services

If you're a public servant, you're wrangling with the explosion of digital services.

That's why teams dedicated to building, managing and providing digital services have been popping up nationwide to tackle the challenge. Places like [Philadelphia](#) and [Washington, D.C.](#) are following in the steps of preceding teams like [Oakland, California](#) and [Georgia](#).

The good news is, even if your government doesn't have a digital services team, you can learn how to operate like it does.

**"It's wonderful to have those skills and talents diffused throughout government and throughout organizations, and not only concentrated in a digital service team,"** said Cori Zarek, Executive Director of the Beeck Center and Co-founder of the nonprofit U.S. Digital Response. We share those skills and talents in this guide.

Use this guide to **1) learn the lessons your peers have learned** and **2) apply them to your agency's digital service delivery**. Think about how your agency can provide digital services not in a vacuum, but as part of a larger engagement ecosystem. And remember that at the heart of this system is the people.



**Figure D**

***"Government leaders and workers must be human-centered to truly create a government that is for the people."***

– [Jenn Noinaj](#), President, Technologists for the Public Good



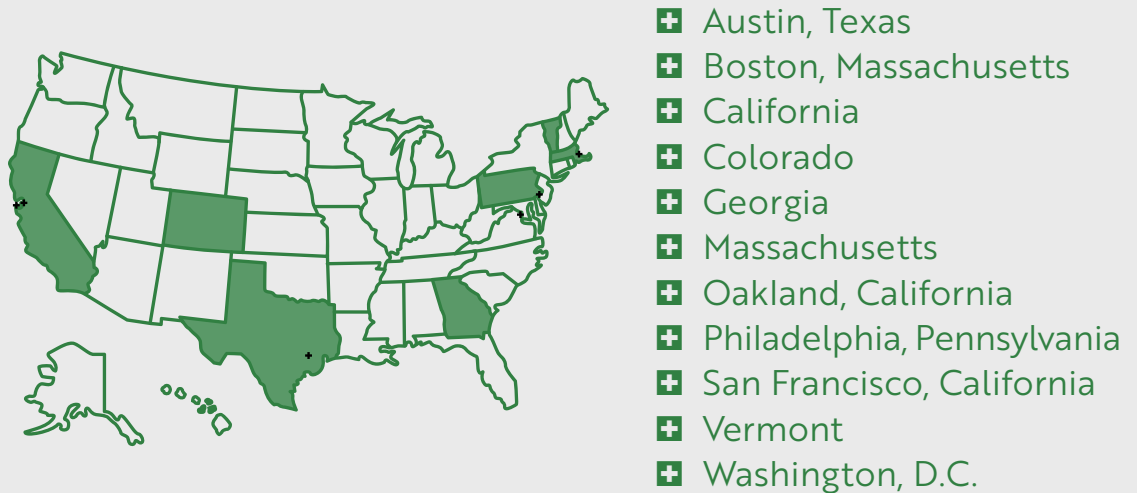
# The Big Picture

“You might be asking a key question: What are ‘digital services’?”

**Digital services are services that take place over the internet or an electronic network.** For example – for the city – this includes forms that are on *phila.gov*, applications and tools, and more.”

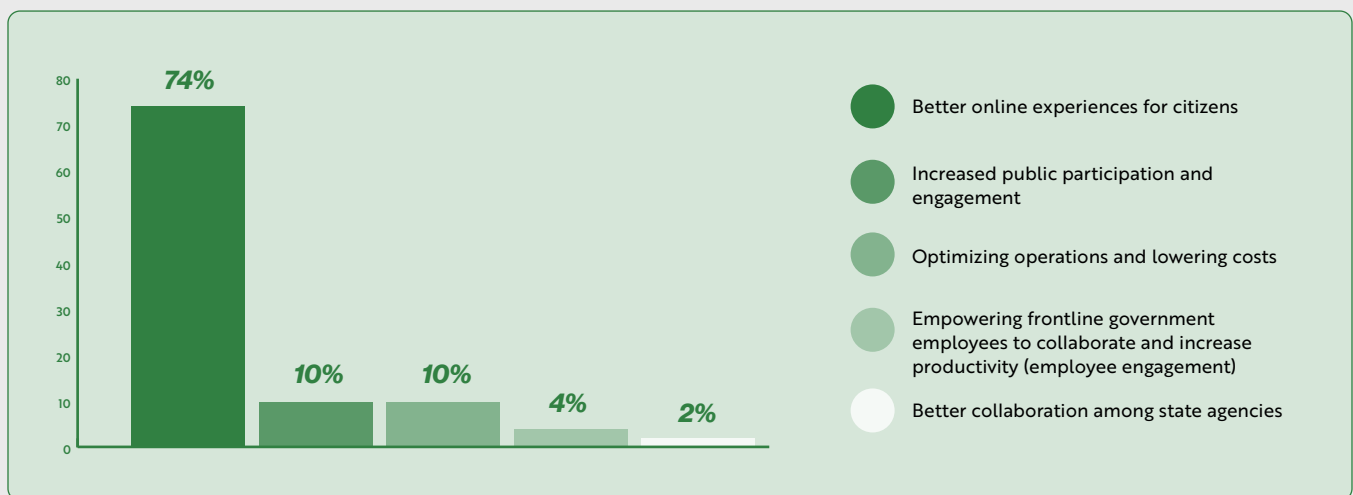
– [Philadelphia Digital Services Team](#)

Here are some state and local digital services teams operating today:



## The biggest driver

In the “[2021 State Chief Information Officer Survey](#),” the National Association of State Chief Information Officers (NASCIO) asked, “What is the biggest driver to expanding digital services?”



**Better experiences for constituents** is the No. 1 motivator by far.

## Heightened priority

Digital services are increasingly a top priority for state and local governments, second only to cybersecurity.

### 2022 State CIO Top 10 Priorities



**1. Cybersecurity and Risk Management**

#1 for nine consecutive years. On the top ten list since 2006

**2. Digital Government/Digital Services**

Steadily moving up the list. Pandemic impact

**3. Broadband/Wireless Connectivity**

#4 in 2021 - on/off list for a decade. Pandemic impact

**4. Cloud Services**

Major force of change. In top three since 2013

**5. Legacy Modernization**

Pandemic impact! On the list since 2011

**6. Identity and Access Management**

Enables digital services. New to the list in 2021

**7. Workforce**

A continuing priority. Back on the list

**8. Enterprise Architecture: Governance**

New to the list in 2022

**9. Data and Information Management**

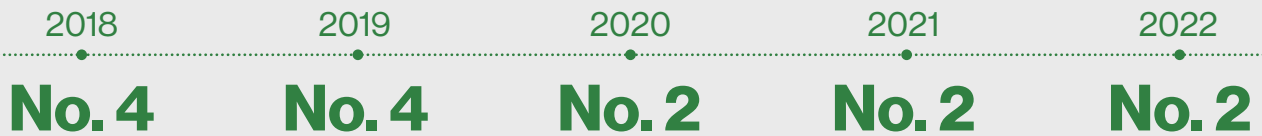
On the list since 2016

**10. Consolidation/Optimization**

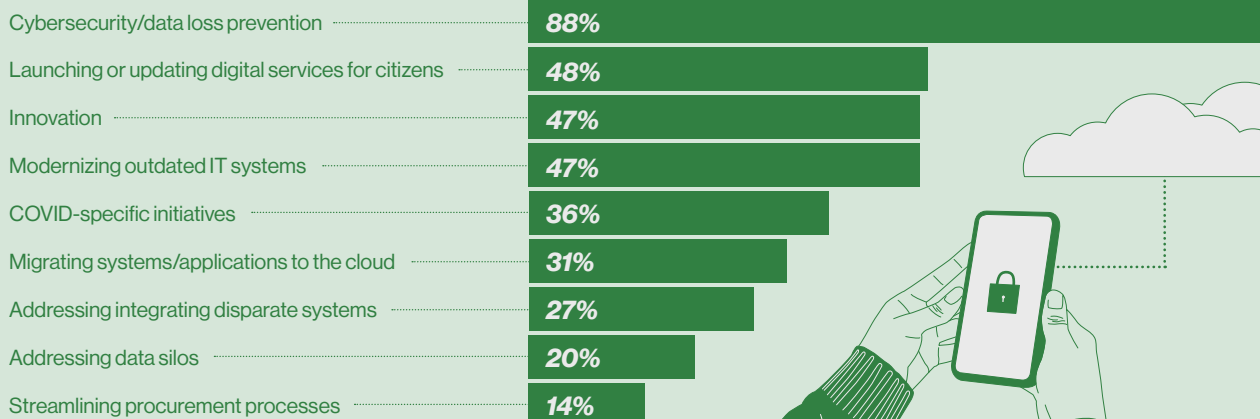
CIO priority each year. Frequently #1 since 2007

Source: [NASCIO's "State and Local 2022 Tech Forecast"](#)

Digital services have also climbed up the top 10 ranking for state CIOs since 2018, when they first made the list.

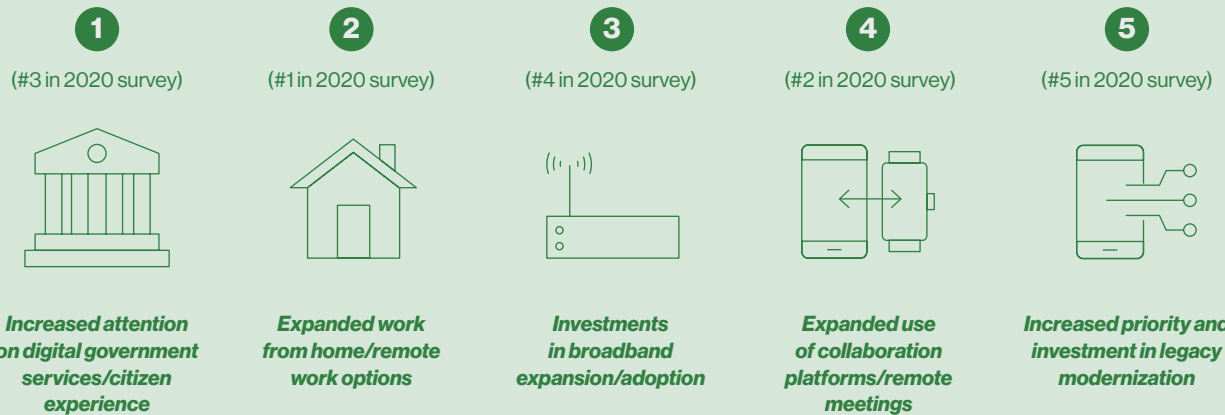


### City/County CIO Technology Priorities Over Next 2 Years



Source: [CompTIA](#)

**Rank the top five business processes, practices or investment changes that you believe will continue post COVID-19 pandemic?**



Source: [NASCIO "2021 State CIO Survey"](#)

Cybersecurity is a major concern as digital services expand. **Eighty-two percent of state CIOs** expect enhanced security and fraud detection around web-based services to be retained beyond the pandemic.

**Potential federal funding**

**+ [State & Local Digital Service Act of 2021](#)**

- Status: Introduced in the Senate in May 2021
- Would establish two grant programs for state and local governments to plan, establish or support digital services teams
- Recipients would have to demonstrate a commitment to human-centered delivery and articulate how they would improve digital services for underserved and disadvantaged communities through the use of funds

**+ [Digital Equity Act](#)**

- Status: Introduced in the House in March 2021
- Would establish a grant program for promoting digital equity, including building capacity for state-led efforts to increase broadband adoption

Technology focus areas for digital services:

- + User-centric design
- + Improved customer experience
- + Security
- + Automation
- + Citizen identity management

Source: [NASCIO State and Local 2022 Tech Forecast](#)

## How Do You Do It?

We spoke with your colleagues, current and former govies who are experts in the digital services realm. We asked them three main questions:



You'll see a variety of perspectives that show the depth and breadth of problem-solving in government. All anchor around the importance of people – your constituents, but also you. As John Clary, Data and Technology Services Manager at the Austin Transportation Department, pointed out: "One of the best things about working for municipal government is that we are ourselves residents and users of the same services that we deliver to the public."

## Featured Voices



**Jenn Noinaj**

President, Technologists for the Public Good



**Sara Hall**

Director of Digital Services, Philadelphia



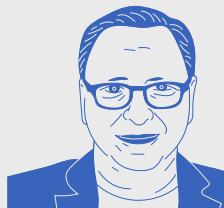
**Theresa Szczurek**

former CIO, Colorado



**Cori Zarek**

Executive Director of the Beek Center, Co-founder of USDR



**Aaron Snow**

Faculty Fellow at the Beek Center for Social Impact and Innovation, co-founder of 18F



**John Clary**

Data and Technology Services Manager, Austin Transportation Department

## Q: Resistance – Did you ever encounter resistance? Tell us about it. How have you overcome it or how are you overcoming it?

“Have you ever done a project where there wasn’t some resistance?” – Snow

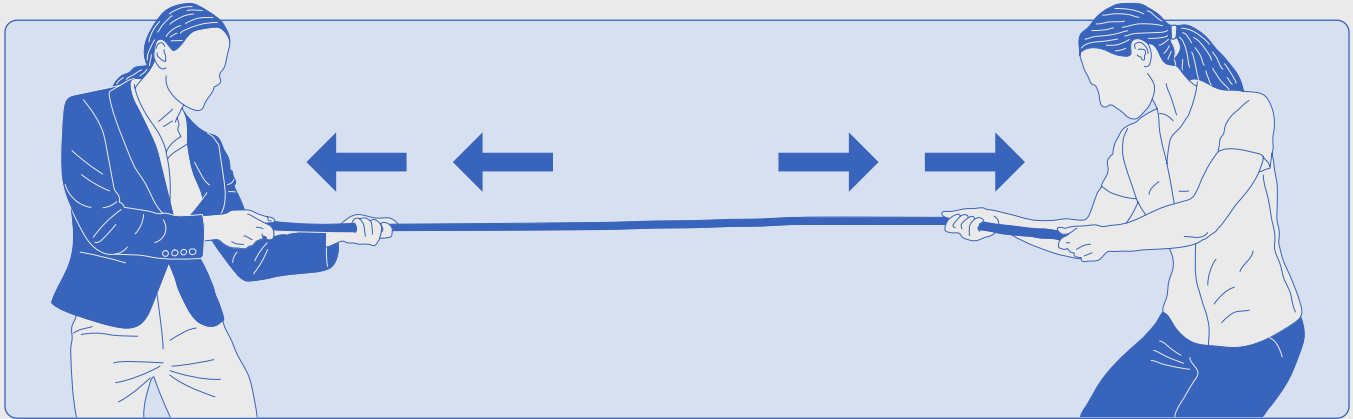


Figure E

### Show Your Work

Risk is inherent in any project. But resistance often tracks back to the people: Who is excited about change and who isn’t? How much does it matter to the people who hold levers such as authority and money?

That’s why one very important path to overcoming resistance is evidence, Snow said. It’s one of the reasons that design research is such a critical part of digital services teams — or whenever you want to introduce change. When you can perform user research and demonstrate findings with empathy and storytelling, it can be transformative.

### How to Show Your Work

User research is a human-centered design method that gets insights directly from users, often through interviews. Noinaj shared five tips for successful user research in [a GovLoop blog](#). (The following is edited for brevity and clarity.)

- 1. Ask broad questions.** It is important to ask questions in a way that doesn’t limit the interviewee’s response. Use neutral phrasing.
- 2. Ask for specific examples.** The best indicator of what someone will do in the future is what they’ve done in the past.
- 3. Listen actively.** This helps build trust and establish rapport with the interviewee.
- 4. Be mindful.** Be aware of interviewer and response bias, where the interviewee answers questions in a manner to be viewed favorably by others.
- 5. Review findings in context.** Don’t take responses at face value. Instead, take a step back and look at all of the interview feedback collectively.



Fig. F



## Earning Trust

“The traditional government IT approach is to try and squeeze as many services as possible into existing enterprise platforms, almost always at the cost of end-user experience.

*“When we first formed the team, we knew we wanted to do things differently, and we knew we needed to earn our users’ trust that we were actually going to improve their lives. Our earliest wins came by working alongside our users to identify opportunities for change, iterating on solutions and eventually building up trust by showing them we were listening.” – Clary*

## 3 Research-Backed Solutions

Through her research, Szczurek has found three major ways to reduce technology resistance:



Share information



Provide the proper technology



Give rewards

When Szczurek was Colorado’s CIO, the state created the myColorado app, which provides a digital ID for residents. It allows Coloradans to identify themselves through the app on their phone without having their driver’s license on hand. Digital vaccine cards are also now available through the technology.

Although the value seems clear, there was some resistance at first, Szczurek said. For example, airports and certain businesses didn’t accept the digital ID, so some constituents felt that since they couldn’t use it everywhere, they weren’t going to use it anywhere.

“We had to educate, and we also had to work to get more places of business to say they were going to accept the digital ID,” Szczurek said. “That was a huge part of having the right technology, but also sharing information.”

And the reward? The app won a [2020 NASCIO State Innovation Award](#). “That was a little pat on the back to say, ‘Hey, you’re going in the right direction,’” Szczurek said.

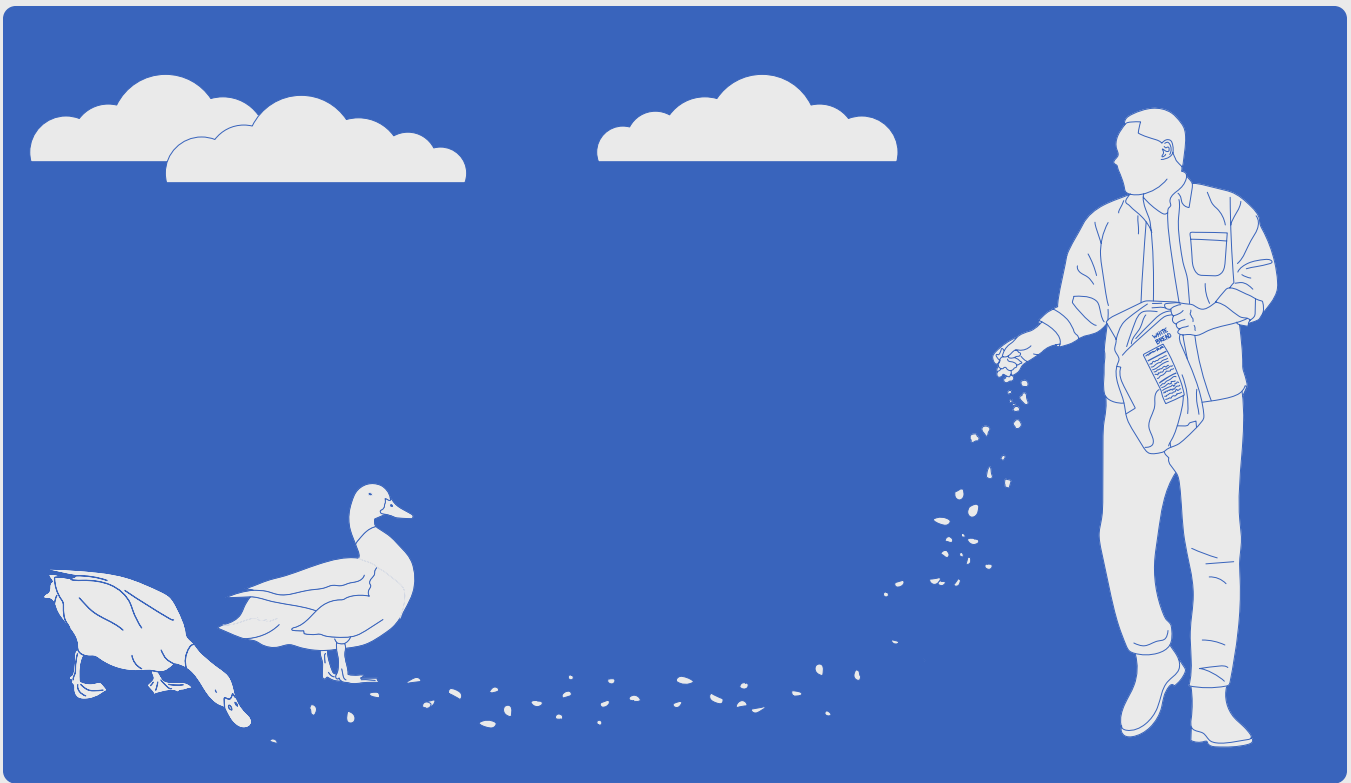
## Stubborn Resistance

Zarek has seen it happen more than once: resistance continuing past initial concerns to sustained defense.

“We’ve seen some good projects die on the vine, essentially, where there have been solid proofs of concepts and abilities to deliver that seemed worth pursuing,” Zarek said.

For instance, [one of 18F’s first projects](#) involved building a central hub for anyone to request government records under the Freedom of Information Act. It faced various barriers, such as leadership concerns about manageability and questions of efficacy. Ultimately, it didn’t end up happening.

“It’s hard to pick something back up once it’s been shelved,” Zarek said. “You see some great momentum, and then fits and starts — and then you’re essentially starting over again.”



**Figure G**

## **Leave a Trail**

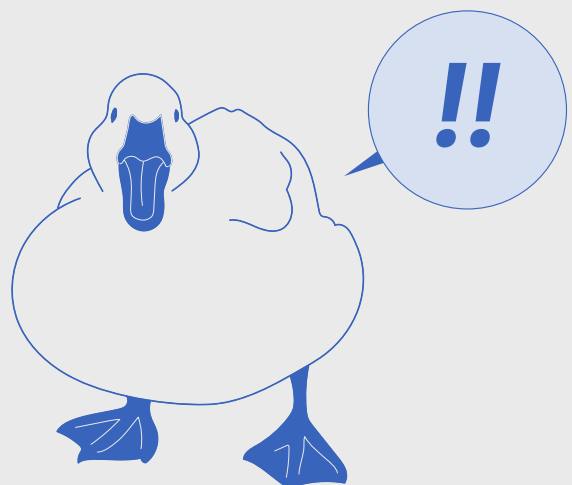
It isn't easy to start a digital services project from ground zero. That's why documenting any work, even if it fails to launch, is invaluable.

When Snow was at the Canadian Digital Service, the team worked on an online system to make it easier for low-income residents to file taxes. Unfortunately, it didn't launch. But the team uploaded all its work — the research, prototyping, lessons learned — to a website, which [still exists today](#). Other researchers and politicians who are interested in continuing the work or doing similar projects have referred to it.

"There's a lot of 'two steps forward, one step back,' and sometimes it's 'one step forward, two steps back' to this stuff," Snow said. "But there is a long game here, and leaving the trail can be really helpful."

## **How to Leave a Trail**

- ✚ **Document from the very beginning**, meaning every sprint, every research cycle, every prototype iteration.
- ✚ **Gather the documentation in one place**. If it's scattered in people's inboxes and Slack channels, it will be a pain trying to find it later.



## **Q: Inclusion – Government services are asked to meet more people’s needs than any other entity. How do you ensure that they are inclusive?**

### **Co-Designing as Key**

“One of the most important pieces is getting into those communities where individuals with lived experience aren’t just there to inform, but also empowered and resourced to co-design.

*“People in their communities know what problems need to be solved, and they often have a pretty good idea of how to solve them. They often aren’t resourced, empowered or provided the spaces to actually provide that insight. The most important thing we can do to design an inclusive system is to demand the space for the individuals with the lived experience to be part of the co-creation and co-design process – and at the very least, to test and inform where the work goes.” – Zarek*

### **How to Apply Co-Design Principles**

The Sunlight Foundation shared a number of methods you can use in your co-design process. Examples in the [“Guide to co-design”](#) include:

- ✚ Hosting public events
- ✚ Conducting feedback surveys
- ✚ Collaborating on open-source tools
- ✚ Posting things on Google Docs to solicit comments
- ✚ Hosting design workshops
- ✚ Gathering experts to comment
- ✚ User testing

For more details on how to conduct specific types of in-person activities, [Service Design Tools](#) is a great website that details a variety of methods.

### **Design Is Not Just Pretty Colors**

In Philadelphia, creating an official digital services team within city government is a promising path to empower more inclusive services.

Hall, the city’s Digital Services Director, is building on momentum from early roadshows or pitches to employees overseeing websites for program offices and initiatives. She joined forces with the city’s director of content to evangelize the benefits of launching cohesive websites under the [phila.gov](#) umbrella rather than going it alone. Creating these partnerships gets to the heart of an ongoing challenge Hall is working to address: not hearing about projects until they’re deep in development or ready to launch.

At stake are missed opportunities to discuss the product’s intent, how to design and organize digital resources, and the content flow for users. These early conversations provide a chance to build inclusive and accessible services by default.

“We’re not just putting a color on to make it accessible. We’re really working on how to make it better [for residents],” Hall said. The city serves a diverse population, and anyone should be able to use and access services.

“It’s more than just the design, and it’s more than just the visual,” Hall added.

Once a new chief technology officer (CTO) is hired, Hall will move from reporting to Deputy CIO for Innovation Management Andrew Buss to the CTO. That will give “design” more of a seat at the table, ensuring that design perspectives are included early and often.

## Services, Not Departments

From a technology perspective, Austin considers the services it supports as parts of a whole, rather than specific agencies’ and subdivisions’ functions, Clary said. That means it prioritizes opportunities to break down technical and organizational barriers that lead to poor quality and accessibility of services. This could mean integrating software systems or bringing stakeholders together to problem-solve holistically.

## Change From Within

For inclusive services in Philadelphia, a workforce that reflects the people it serves matters. But there are barriers to building a workforce like this, especially in tech organizations.

Salary inequity is one challenge. The city technology department’s higher-paying executive positions, for instance, are mostly white. And, this is common in tech organizations. Nationwide, 83.3% of executives in the tech sector are white, according to the [U.S. Equal Employment Opportunity Commission](#).

To start building a more diverse and equitable municipal workforce, Hall and her colleague Dan Lopez, the city’s Software Engineering Director, came up with the idea for [an apprenticeship program](#). The program will upskill existing city employees to learn user experience (UX) and software engineering, prioritizing those who make less than \$50,000 a year.

“We started pitching it to Mark [Wheeler, the CIO], we started pitching it to Stephanie [Tipton, the Chief Administrative Officer]. Eventually, they said, ‘OK, let’s do this,’” Hall said.

The first cohort — a UX designer and two software engineers — started this year. The next step is figuring out how to fund the program long-term.

## What Leaders Can Do

“It is largely known that the tech industry is predominately white and male. There is also a lot of privilege that exists for tech workers. This means that leaders have to work even harder to create a culture that is inclusive of all backgrounds and experiences.

“You can start small and set a precedence for inclusivity and authenticity,” [Noinaj wrote](#).

- ✚ Seek input and opinions from people with different backgrounds and experiences than yours.
- ✚ Raise up others’ voices and show that you value everyone’s feedback.
- ✚ Lead by example and bring your full self to work to help others do the same.
- ✚ Recognize the power you have as a leader. It is especially important to make yourself approachable and reach across the aisle so your team can trust you.



## **Q: Morale** – Providing government services can be a difficult calling, with its share of setbacks and criticisms. How do you persevere and keep up morale?

### ***Humility as the Mindset***

“This is maybe a harder problem for folks who come in from the outside of government than for folks who have built their lives around civil service as a career. ... Especially for folks who come from the software and product world, where they ship things and then get you the feedback, and then ship other things, this is different. It is different work.

***“There’s some fundamental calibration of what you expect coming into this job. ... There’s a humility you have to bring to it all the time. It is infinitely easier on the soul and the conscience and the psyche if you come to this gig thinking, ‘I am here to serve. I’m here to help government serve people better.’” – Snow***



**Figure H**

### ***Find Your Passionate Purpose***

“I look at this as a pursuit of passionate purpose. ... Passion is defined by your values being aligned with your gifts. And in that intersection you’ll find your passion. ... So find your passion, and then align it with a purpose.

***“I have found that when people have a passionate purpose and they pursue it, they are more engaged, they’re more productive, and that leads to higher satisfaction as well as results. We as managers need to provide a way for people to pursue something meaningful. We need to give people choice. We need to let them know that they can be confident in pursuing things and making progress.” – Szczurek***



**Figure I**

## A Supportive Culture

“Having a strong support group is great. I have a lot of colleagues who really support me, and Liana [Dragoman, Philadelphia’s Director of Strategic Design] is one of them. She has done such a great job to lead a lot of the practices I learned around my communication, killing it with kindness, essentially, and dealing with tough conversations. ... I’ve just had so much support from executives from [the Office of Innovation and Technology] and partners in departments.

*“It’s great having a group of people to really help you think through things in this space. There have been tough times, and it’s just like, ‘We’re going to figure it out.’”* – Hall

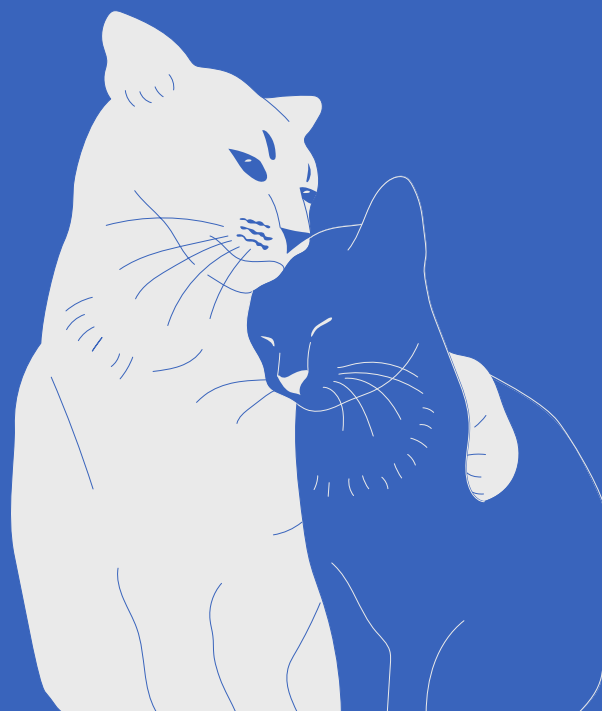


Figure J

## We’re Residents, Too

*“One of the best things about working for municipal government is that we are ourselves residents and users of the same services that we deliver to the public. We ride in the same bike lanes, sit at the same traffic lights, and experience the same challenges around housing and affordability. Our critics are our neighbors and family members, so when something isn’t working well for them, it can hurt on a personal level. At these times, we reflect on our values, take care of each other and celebrate our successes.”*

– Clary



Figure K

## ***This Is Generational Work***

“Folks understand how hard this work is, and just how much we take on and carry as you bring new approaches in. I think they have been very thoughtful about investing in relationships, ways to support each other, **informal collaboration spaces** and therapy spaces. The community, at least in the U.S., who are working in this space are often in touch with one another through formal mechanisms like conferences and events and through informal meetings.

*“That personal touch is so critically important. ... We recognize how important those touchpoints are, and we want to be sure we’re investing in more of those spaces and dedicated big tents where people can find their way in and get the help and support they need to keep going. Because it is generational, as our friend and colleague Jen Pahlka [Co-founder of the U.S. Digital Service] says. This is not something that we embark on and see get done in our careers or in our lifetimes. It will be forever, this work.” – Zarek*



**Fig. L**

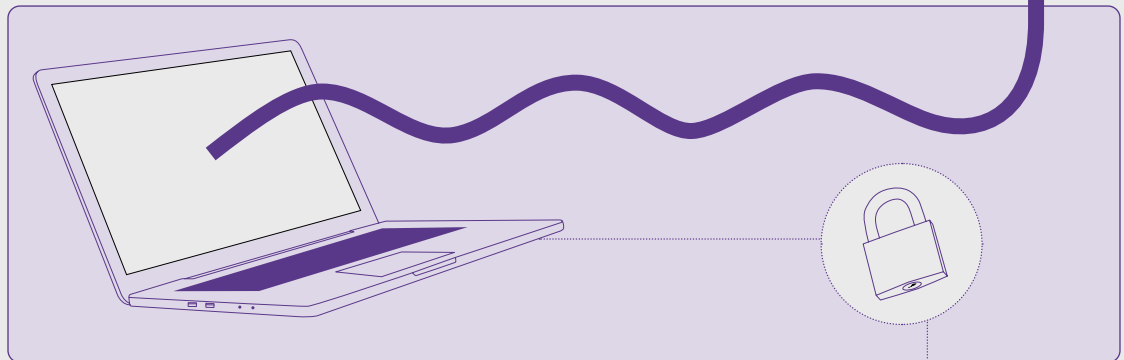


**Fig. M**

# Technology 101



**Figure N**



**Figure O**



**Figure P**

Increasingly, digital services require IT expertise. From filing taxes to receiving benefits, constituents request and receive many services with the help of digital technologies. They need these supporting systems to be effective. That's why all public servants who use and manage these systems need a basic IT acumen to provide services that are not centered on the agency, or even the technology, but the people they serve.

We spoke with industry vendors who have been key state and local partners in delivering public services. Here is the expertise they shared.



# Digital Solutions at the Street Level: How to Modernize Parking Services



*An interview with Bob Shepard, Vice President, Product, Passport, Inc.*

Imagine this: Huge Brinks-style trucks manned with municipal workers crawl through the streets of Chicago, carrying stacks and stacks of quarters across 50 wards of the metropolis. Workers hop on and off collecting coins worth thousands of dollars from parking meters into the back of a truck.

This isn't fiction. It's really how the city government used to collect parking fees.

But today, Chicago and other municipalities have digitized their parking services and enforcement – so no more risky trucks in the Windy City. And the municipalities that have turned to digital services are reaping the benefits, said Bob Shepard at Passport, Inc., a digital mobility services provider. Here are three ways digitization can improve services for your community.

## **Efficiency, Accuracy**

Historically, parking enforcement officers used paper lists and checked license plates manually. Was that a zero or an O? You couldn't be sure. These paper-based processes were inefficient and frequently inaccurate.

Now, there are solutions like Passport that digitize the experience and automate manual processes. For example, the system can automatically flag whether an O is a zero, or vice versa. Automation can save time and resources when both are hard to come by.

Raleigh, North Carolina, for example, was able to cover parking enforcement for the whole city with limited resources. It didn't have enough people to manage the physical processes of traditional parking enforcement. Adopting a digital solution helped lessen the load on employees while maintaining operations for the city.

## **Security, Compliance**

Unlike documents being stored in a massive filing cabinet, a digital environment provides security with peace of mind.

Anyone with physical access to a filing cabinet can find sensitive information they shouldn't have. A digital system like Passport's limits permissions to the right people. It also logs who accesses the system and ensures it's keeping only the right amount of data for the right period of time.

Digital solutions such as mobile parking apps can also increase compliance while providing a better experience for residents. Through apps, cities can send notifications on expiring parking sessions, and residents can add more time from their phones. The outcome? Parking compliance and revenue goes up, and residents don't have to interrupt important meetings and nice dinners.

## **Equity**

Parking violations don't affect everyone the same. For low-income residents, a \$50 ticket can be a major expense that's difficult to pay. Further, losing your vehicle from unpaid citations can mean losing your means to employment. The long-term effects are debilitating.

"Looking at the data, if cities offer discounted prices, a longer period of time to pay, or even payment plans, which are solutions that Passport has today, it will actually result in greater compliance of paid citations and increased revenue," Shepard said.

With the right data and technology, municipalities can lighten the burden for their most vulnerable members.

"Equity and inclusiveness are real focus areas for municipalities. Digital solutions are a way to achieve that," Shepard said.



# What Should a Public Servant Sound Like?



*An interview with James Greene, Business Development Manager, Public Sector, Jabra*

When you engage with constituents or work with colleagues, you want to hear and be heard by them. But in the increasingly hybrid workplace, this can become more of a challenge.

Let's say you're a remote municipal employee working from home. You're talking to a resident about a utility bill when – ding dong – the delivery person arrives with a package. The dog starts barking, or the bird starts squawking. Sirens rush by. Now put yourself in your resident's shoes. Even if you may be fully attuned to the conversation, these distractions can send a nonverbal message that disturb the conversation aurally or visually.

"On either end, you want to know that the person you're speaking to is listening to you, can hear you, can understand you and is not being distracted," said Jabra's James Greene. Having industry-leading audiovisual devices will ensure your constituents can receive clear, engaged and trustworthy service.

## **Clear**

One state agency's transportation department needed to equip employees with audiovisual devices for a variety of work. For example, contact center agents needed to interact with residents either in central headquarters or remotely, whereas field staff had to communicate from noisy locations.

The same device wasn't going to work for different environments. So Jabra provided workers in the field with a device that could reduce up to 95% of background noise. Even if there was a construction tool pounding nearby, they could communicate clearly. For contact center agents, headsets with analytics helped identify the tone and tenor of the person they were speaking to. This helped employees train and provide relevant, empathetic services to residents.

## **Engaged**

Clear audiovisuals help people stay engaged in conversations. But flexible tools can also help employees do their very best work.

Greene uses a headset, for instance, that allows him to get up from his desk while staying connected to whom he's speaking to. "Roughly 500 feet from my desk is where I do my best thinking," Greene said.

For many employees too, work can happen anywhere – at your cubicle, in a conference room, in a guest bedroom or on the treadmill. As the hybrid workplace is becoming reality for government, agencies must equip their personnel with professional-grade tools so they can engage in top-quality service wherever they are. Devices shouldn't limit work; they should follow where the best work happens.

## **Trustworthy**

At the end of the day, these audiovisual details build trust. Clear conversations with minimal distractions can make people feel seen and heard as if they were together in the same room. The right solutions to enable secure, high-quality communication from anywhere are vital for nurturing trust.

"Our products were designed for conversations," Greene said. With solutions for various needs and plug-and-play functionality, Jabra can support a seamless transition to delivering government services in the hybrid workplace.

# How to Build Innovation Into Service Delivery



*An interview with David Egts, Chief Technologist, North America Public Sector, Red Hat*

From the lobby to the living room, constituents are changing expectations about how they want to interact with their government.

They don't want to drive to a facility only to discover they have the wrong forms, forcing them to travel back and forth. They want options. People are increasingly expecting interactions with government to be like interactions with commercial brands — easy, delightful and from the comfort of their living rooms.

Technology is just a piece of this puzzle, but it must be robust, flexible and secure enough to support digital services. And more than that, meeting new standards requires a kind of innovation from state and local agencies. Of course, there are some challenges to overcome along the way.

## 3 Challenges to Digital Delivery

Red Hat's David Egts outlined three challenges in digital service delivery that state and local agencies face.

- **Scalability:** Think about the unemployment benefits systems that were overwhelmed not too long ago. They were never designed to handle the deluge we've seen over the past few years, so they struggled to scale and meet constituent needs.
- **Security:** On-prem and cloud-native security postures require different mindsets. Applying traditional methods to cloud computing, for instance, won't be as sound as enabling the latest cloud security and zero trust methodologies.
- **Workforce:** Attracting and retaining talent, particularly around digital services and cybersecurity, is one of the most difficult challenges for state and local leaders. There is simply never enough talent to go around between the public and private sectors.

To overcome these obstacles, agencies need to be innovative — meaning creative, flexible and smart about the solutions they employ. The kind of innovation they want is taking place in the open-source world.

"The hottest technologies coming from Silicon Valley and around the world are coming to life in open-source communities," Egts said. "And that's where Red Hat lives. We harness and participate in open-source engines of innovation and ensure the technologies are ready for government use."

Open-source tools such as Red Hat's provide the flexibility to take systems to the cloud, physical and hybrid environments. The platform stays the same, so everything else can change to meet new needs.

For example, [the city and county of Denver](#) was able to support remote employees and continue critical services through Ansible Automation, Red Hat's open-source IT automation platform.

- It scaled up a collaboration tool to support more than 15,000 remote employees after COVID-19 hit.
- It removed human error from the loop as much as possible in the rapid rollout, reducing security vulnerabilities.
- And it decreased the amount of time to create a communication channel from 20 minutes to less than one, saving 372 work hours for IT staff.

Automation helped Denver sprint, but it is also helping it run a marathon. Delivering services is for the long run, and thanks to automation, the workforce can keep up without burning out.

"Let automation do repetitive tasks for the IT administrator, to free that person to work on the innovative tasks only that person can do, such as improving service delivery and delighting their customers," Egts said.

# When Moving Services to the Cloud, Think Data First



*An interview with Brian Schoepfle, Solutions Architect, Amazon Web Services*

It's true that agencies can use data to better support quick decision-making and to better serve their constituents. And it's true that moving data to the cloud can improve their ability to use data. But there's a catch: If your data's a mess when you move it to the cloud, all you get is a cloud-based mess.

That's the idea behind a data-led cloud migration. In moving applications and services to the cloud, you don't want to move your existing data silos to the cloud. Instead, you want to centralize that data, making it easier to manage, secure and enrich.

"Just getting it to the cloud is ... a good step, because you will reduce some of the costs that are associated with just ensuring the health of blinking green lights," said Brian Schoepfle, a solutions architect at Amazon Web Services (AWS). "But you need to start leveraging the new capabilities that you will have by virtue of being in the AWS Cloud to really extract the kind of information that you want from the data that you have."

Schoepfle highlighted the key steps in a data-led migration.

**Focus on data quality, data quantity and data sources.** Data can be extremely valuable, but only if it is free of errors and structured so users can interact with it efficiently. It's equally important to have enough data to perform required tasks. In general, more data leads to more reliable models and better results.

**Clean, enrich and transform data.** Clean data is free of errors, with a high degree of integrity. After being cleansed, the next step is enriching the data by adding context from additional relevant sources. Finally, the data must be transformed, based on its intended use and the tools that will be used to interact with it.

**Move data into cloud-based data lakes.** Essentially, a data lake is a large pool of data. The goal is to centralize as much data as possible into data lakes, and to have as few data lakes or lakehouses (a combination of data lake and data warehouse) as possible.

**Apply analytics, AI and machine learning.** Whether it's predicting outbreaks, uncovering fraud or improving public safety, good data is at the root. By taking the previous steps, analysts and models will have access to clean, relevant data to power insights.

DLT Solutions, an Advanced Consulting and Managed Services Partner for AWS, helps agencies create a comprehensive, cloud-led data strategy that can support requirements for analytics, automation, AI and machine learning. DLT and AWS recommend that agencies migrate data in stages, instead of all at once.

"It pays to be methodical about what you are bringing into the cloud, and it gives you time to apply learnings from each stage to make the next stage more effective," Schoepfle said.

At the same time, there is no time like the present to start. "There will never be a time when conditions are perfect," he said.



# How to Develop Digital Services for the Next Big Change



*An interview with Kevin Lafeber, President, GovOS*

It is somewhat a paradox that state and local governments are expected to be more transparent and more secure than ever before. While the increasing threat of ransomware looms large, constituents are also demanding openness, ease and accessibility through digital services.

The pressure is on. These agencies have to get digital services right and show value in a short period of time, or risk public backlash.

Fortunately, many agencies have become familiar with the habits of nimbleness, having dealt with the whirlwind of the pandemic's beginnings. The urgency now is to ensure they have the flexibility to respond to the next big change, and not wait until a crisis erupts.

"Systems, vendor relationships and policy should be architected to allow for long-term flexibility, not just solve the current problems at hand," said Kevin Lafeber, President of GovOS, a company that helps government deliver online services.

Here's one example of how a local government stayed adaptable, and reaped the rewards.

## ***This County's Services Got Better, Better — and Better***

Like most governments, Pennsylvania's Dauphin County had to shut down in-person interactions in 2020. Before then, residents submitted filings for probate at the courthouse on a first-come, first-serve basis. The county had to find a way to continue servicing residents despite limited in-person interactions.

In the beginning, it built its own virtual system to facilitate probate filings. But the system relied heavily on emails and phone calls, leading to constant back-and-forth. Scheduling

appointments also required a lot of manual effort, with staff managing internal and external calendars that were unsynced. It was difficult to know who was available when.

So, the county turned to a single portal through GovOS that assuaged both pain points. Instead of email back-and-forths, residents could use one portal to submit their filings and schedule appointments. The portal synced with employees' calendars on the backend, meaning staff had up-to-date, accurate information about appointments.

In the first two months of the updated system being online, the county processed 92 virtual probate submissions.

But that wasn't the end. From there, it expanded the system to digitize their marriage license application process. As of March 2022, more than 2,100 marriage license applications have been submitted online.

Through this one system, 90% of marriage license applications and 86% of estates probated are completed virtually.

This was progress that garnered an award, [Pennsylvania's 2022 Governor's Award for Local Government Excellence for Information Technology](#).

"They are a perfect example of how a department can get fast results by updating one process, and then digitizing more and more to create a holistic, adaptable online civic services offering," Lafeber said.

Digital transformation is a journey for state and local agencies, not a single point in time. They need services that can help them be adaptable and ready for any change.

"The key to sustaining digital services is to be adaptable to the needs of employees and citizens," Lafeber said.



# Paper Is Draining Your Talent: Digitize Spend Management Instead



*An interview with Jim McClurkin, Senior Director, State and Local Government, SAP Concur*

Are there administrative bottlenecks that stop you from growing your career? Wrangling with tedious processes, such as filing expenses or organizing invoices, can bog down your day-to-day work.

But clunky processes aren't just inconvenient. They have negative implications on employee satisfaction and growth.

For example, many state and local governments still depend on paper and ink to track their spending. It's not uncommon for the process to look like employees carrying a pound of paper expenses from one building to another. You may see some obvious pain points here: timeliness, manual labor, security perhaps. SAP Concur's Jim McClurkin elaborated more on how paper-based spend management drains employees and agencies.

## **Pain points**

- ✚ **Physical bottlenecks:** Paper-based processes require you to be physically present to submit forms, sign papers and approve reports. If someone is absent or out of the office, the whole procedure gets held up.
- ✚ **Barriers to training:** Some employees would rather forgo professional development opportunities to avoid the pain of filing travel and training expenses. McClurkin has seen it. It's a kind of "intellectual drain" that happens due to a frustrating spend management process.
- ✚ **Out-of-pocket burdens:** Oftentimes you spend money out of your own pocket to pay for work-related expenses that you recover later. Manual procedures lag the speed to payment, making the cost a more prolonged burden than it should be.

- ✚ **Adult "arts and crafts":** Employees spend their time scrapbooking and scanning receipts in paper-based operations. This isn't the kind of user experience ideal for high satisfaction and growth.

## **Digital relief**

Digitized spend management can offer relief from these paper-based pain points. But they can also do more, improving decision-making capabilities for the whole agency.

**At the tactical level,** it creates efficiencies for users, eliminating physical bottlenecks and ensuring timely speed to payment. SAP Concur uses artificial intelligence (AI) and machine learning (ML) to automate workflows, so that employees can simply take a picture of a receipt instead of manually detailing a form. No more "adult arts and crafts," McClurkin said.

**At the strategic level,** digital spend management provides new and improved decision-making insights for leaders and executives. If you lack the capacity to aggregate and report expenses into one system, you lose out on the ability to manage the whole spend management process.

SAP Concur's AI and ML-powered workflows capture spending data in near real time and make it visible. Leaders can spot trends, anomalies and gaps in the spending flow in one place, enabling them to make data-driven decisions around spending.

"It opens up a whole new way of thinking about spend management, process improvements and workflows," McClurkin said.

# 4 Steps to Fill the Digital Skills Gap at Your Agency



*An interview with Tony Holmes, Director, North America Public Sector, Pluralsight*

The half-life of tech skills is shrinking. And that means skills gaps are growing at an exponential rate. Buying our way out of a tech skills deficit is no longer sustainable, either fiscally or operationally.

Agencies need a sustainable approach to meet the digital skills demand. They need to develop a culture of learning, according to Tony Holmes at Pluralsight, a tech workforce development company.

**“A culture of learning is an environment that encourages, supports and recognizes learning as the lifeblood of not just personal growth, but organizational growth,”** Holmes said.

Implementing a culture of learning will organically produce creative thinkers and problem-solvers. And, it has the power to positively impact at least five (including the top three) risks identified in the [NASCIO State CIO Top 10 Enterprise Risks for 2022](#), not least of which is staff recruitment and retention.

The most important element to fostering this culture requires a cultural mind shift, and a deliberate, committed effort, particularly from the top. Holmes shared four best practices to create a culture of learning at your agency.

## 1. Demonstrate the priority of learning

Historically, organizational attitudes view learning as time away from work. But learning is actually a key component to work, especially in this fast-paced digital world. Executives, leaders and managers need to understand this. And more, they need to champion it.

“Some of the best organizations I worked with have leaders who attend training with employees, saying, ‘I’m in there with you. Learning is as important to the C-suite as it is for everybody else,’” Holmes said.

“When you start seeing leadership lead by example, it resonates throughout the agency.”

## 2. Have champions across roles and departments

Of course, agencies don’t just need executives to change the culture. Everyone must buy in. To this end, a team of champions, from a variety of roles and departments, who understand the profound impact of a learning culture is irreplaceable. No amount of forced conscription to a team or project can replace the boost that harnessing passion can bring, Holmes said.

## 3. Make training accessible and inviting

Many agencies deliver training as a “push” endeavor, forcing employees to learn skills the agency thinks they should be learning. Instead, they should shift to a “pull” approach, providing resources, such as Pluralsight’s library of 7,000-plus online courses, for employees to chart their own growth path — not just in specific areas, but in all aspects of learning. This attracts employees to take learning into their own hands.

## 4. Establish a chief learning officer

A chief technology officer (CTO) focuses on investing in next-generation technology. But who will plan the equivalent strategic investment in staff to support the technology? Purchasing talent is no longer sustainable, especially as the skills shortage deepens. Agencies need an executive thinking about the future of talent development, and planning organic talent growth as a strategic priority.

“Everyone has a personal responsibility for their learning, but organizations can drive that from the top down through the chief learning officer,” Holmes said.

# How Government Is Delivering CX at the Largest Scale Yet



*An interview with Angy Peterson, Vice President, Granicus Experience Group and Charlotte Lee, Strategic Lead for Customer Experience and Innovation, Granicus*

Agencies are experiencing brand-new challenges with customer-centric service delivery.

Although commercial organizations have been experimenting with and delivering customer experience (CX) for years, agencies are now bringing about a novel approach to CX – namely when it comes to scale.

“This is not just what the private sector has done by any means,” said Angy Peterson, Vice President for Granicus Experience Group (GXG), a digital firm that helps government build better citizen experiences. “This is truly trying to serve and create access to services for hundreds of millions of people.”

Because of this, the imperative to serve all, not some, is vital.

“It’s important to know the role that a deep consideration for diversity, equity, inclusion and accessibility will mean toward the mission to improve the experience of people receiving government services,” said Charlotte Lee, Strategic Lead for CX and Innovation at Granicus. “Government doesn’t have the option not to serve certain people.”

How can agencies continue an inclusive journey to deliver multichannel, human-centered services at a scale unlike any organization before?

## **Communication Tools as Constituent Engagement Tools**

To tackle such a large-scale challenge, start with what’s in front of you. Think about how existing communication channels can personalize outreach and expand targeted engagement.

For instance, [Indiana’s social services agency](#) faced a challenge with consistently reaching families via mail or landline telephone. It was also difficult to coordinate messaging with childcare providers around changes to policy and licensing information.

When COVID-19 hit, it needed to ensure all the more that communications were getting to the right people, so that working families – particularly those of essential workers – received the childcare services they needed.

The agency was already using Granicus’ govDelivery platform as an email tool. So, the GXG team helped the agency expand its use to create a unified and agile communications strategy for personalized and effective messaging. For instance, the team designed automated drip campaigns, which sent a collection of personalized messages to relevant families and constituents with the aid of automation.

The proof of immediate impact came when phones at the agency started ringing off the hook.

With GXG’s help, the agency was able to create a collection of email topics and communications that reflected the breadth of their services, while managing consistent messaging to families and providers. This also allowed more flexibility in segmenting their audiences by needs or location to make sure that the most relevant information was being delivered.

Ultimately, the agency was able to provide a more consistent customer experience that welcomed engagement. By strengthening the overall communications to align with agency goals, the hope and vision is that families will increasingly trust in the agency and the government at large.

“With such a massive vision laid forth, there are boundless opportunities to empower teams with human-centric leadership,” Lee said.





The pandemic may have caused a sudden spurt of digital services, but public servants are in it for the long game. As [the city of Austin put it](#), the goal is to “build living digital services” that grow with residents and their needs. Services should not be delivered in a vacuum, but as part of the larger engagement ecosystem. And people are the most important part of this system — both those who are served and those who serve.

Here is a quick exercise to help you apply what you read:

- + Write down one actionable takeaway you learned.
- + Why is it important?
- + How will you carry it out?

Want to connect with other state and local digital services folks? Check out the Beeck Center’s [Digital Service Network](#) and/or [Intergovernmental Software Collaborative](#).

## GovLoop Guides That May Interest You

- + [Your Field Notes for Data-Driven Decision-Making in Government](#)
- + [Turning Vision into Reality: How Agencies Can Forever Improve](#)
- + [Customer Experience Beyond Memos: A How-To Guide](#)
- + [Normalizing Innovation: Lessons from State and Local Leaders on the Ground](#)

## Recommended Resources

1. [10 Hiring Tips for Attracting Underrepresented Digital Services Talent to Serve](#)
2. [Colorado Digital Service Team Agreement](#)
3. [Colorado Digital Service Playbook: Incorporating Equity Into Decision-Making](#)
4. [City of Austin Digital Style Guide](#)

Have feedback? Questions? Drop a line to [pearl.kim@govloop.com](mailto:pearl.kim@govloop.com).

### Authors:

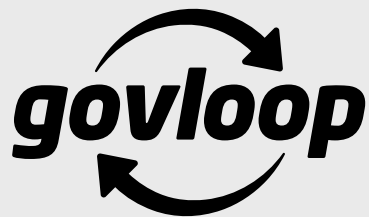
**Pearl Kim**, Senior Staff Writer

**Nicole Blake Johnson**, Managing Editor

**Candace Thorson**, Senior Staff Writer

### Design:

**Calista Lam**, Graphic Designer



1152 15th St. NW Suite 800  
Washington, DC 20005

P: (202) 407-7421 | F: (202) 407-7501

[www.govloop.com](http://www.govloop.com)  
@GovLoop