



**PHL SERVICE DESIGN STUDIO**

**year one**

# Table of contents

Introduction	4
Defining service design	5
About the PHL Service Design Studio	6
Enabling remote work due to COVID-19	11
Leading service improvement efforts	21
Supporting our team, colleagues, and communities	35
Planning for the future	40

This report outlines what the PHL Service Design Studio (SDS) accomplished from **February 2020 to February 2021**.

The document is divided into the key areas of our work, which include leading service improvement projects, capacity-building efforts inside and outside of municipal government, and planning for the team's growth.

If you're curious to learn more about the team, access our [website](#), visit us on [Twitter](#), or email us at [service.design@phila.gov](mailto:service.design@phila.gov).

Access the [Good Services website](#) if you'd like to learn more about service design as a professional field and practice.

“Systems of oppression, inequality, and inequity are by design. Therefore, they can be *redesigned*.”

■ Antionette Carroll, Founder, President, and CEO of Creative Reaction Lab

# Introduction to year one

The Service Design Studio at the City of Philadelphia launched at the beginning of February 2020. Within one month, we left our physical office in the Municipal Services Building to work remotely due to the COVID-19 global pandemic.

We navigated 2020 with our eyes wide open—collectively experiencing the impact of the global pandemic; an economic and housing crisis; the loss of over 600,000 family, friends, and neighbors due to COVID-19; the killing of George Floyd, Breonna Taylor, Tony McDade, and Walter Wallace Junior at the hands of the police; and the attack on our elections by white nationalists. 2020 reconfirmed for us that our norms, institutions, and systems—built to uphold and preserve white supremacy—are failing us. And our systems are disproportionately harming Black, Brown, Asian, Indigenous, LGBTQIA, immigrant, and disability communities.

Considering the weight of the year, we've been moved by activists across the world and in Philadelphia who've been organizing for racial justice and a multiracial democracy. We've been moved by colleagues who've been tirelessly working to center racial equity in how we work as a government. We've been moved by project partners and team members who showed up—while managing the increased stressors of everyday life—and committed to the difficult and necessary action that's required to make government work for all Philadelphians, not just those with power, position, and privilege.

This report documents how we sought to center our collective humanity and embody the principles and values of equity and justice in how we work as a team and how we collaborate with our project partners, colleagues, and Philadelphians to improve City services for the better.

## In our first year, we:

- Helped colleagues adapt to remote work while managing the stress of the pandemic.
- Redesigned City services. We addressed issues like digital inclusion, equitable community engagement, and accessible mail-in voting.
- Supported City-wide strategic initiatives that sought to make City government a more racially just institution.
- Coached our colleagues on how to use participatory methods to share decision making power with communities.
- Connected with our broader design community—presenting at public design events, meeting with university students, sharing best practices with other civic designers, and welcoming conversations with practitioners looking to learn more about service design in the public sector.
- Developed our standards of practice as a founding team. For example, we created a how-to guide for conducting ethical design research.

We worked with colleagues inside and outside of government. We tackled a wide variety of subjects. We worked with over thirty City agencies. We shared moments of sadness, disappointment, anger, joy, and celebration.

It's been a year.

# Defining service design

## *What's a service?*

We often use the word service when we talk about good or bad experiences with a company or when we experience service interruptions and outages. In the book *Good Services*, Lou Downe defines a service as, “Something that helps someone to do something.”

Services are the series of interactions and artifacts that make up our experience of setting up an appointment and visiting a doctor, ordering and buying a hoagie, or opening up and managing a bank account.

The City of Philadelphia is one of the largest service providers in the city. We provide hundreds of services, like sanitation, emergency housing, rental assistance, child and family welfare programs, and public safety, among many others. Often times, residents don't have a choice but to use a City service. Other government services, like firefighting, are life-essential.

## *What's service design?*

**Design is the act of imagining and planning** the creation of objects, products, communication, systems, processes, and built environments. Graphic design, interior design, and architecture are disciplines most associated with the word design. However, there are over twenty different design disciplines. Service design is one of them.

**Simply stated:** Service design professionals design services. Service design is a multi-disciplinary field of practice that's been in existence for over twenty years — drawing from sociology, ethnography, and human factors, among other disciplines.

**Service designers design for the entirety of a service experience.** We consider how all the artifacts and people within a service work together to accomplish mutual goals. First, we seek to understand the lived experience of people who participate in a service ecosystem (e.g., frontline staff, policymakers, service partners, and those who use a service). This includes the quality of their relationships and the histories and context that inform those relationships. With this insight, we map and visualize service experiences from beginning to end to uncover what works and doesn't. Then, we co-design future-oriented solutions that amplify the strengths in a service and resolve challenges with those most impacted by change.

# *About the PHL Service Design Studio*

This section includes information about:

- Our journey
- The founding team
- Our purpose
- What we do
- How we work

# About the PHL Service Design Studio

## *Our journey*

The City of Philadelphia has a long history of using service design to improve Philadelphians' interactions with government. While the Service Design Studio is new as of February 2020, we've been building the practice inside City government for many years.

**2015** **Office of Innovation and Technology** (OIT) hires designers to support the redesign of phila.gov.

**2016** **The Office of Open Data and Digital Transformation** (ODDT) is created by the Office of the Chief Administrative Officer (CAO) to solidify the importance of design at the City.

**2017** **ODDT and GovLabPHL**, an initiative led by the Mayor's Policy Office, launch a year-long speaker series on service design in the public sector with the University of the Arts.

**2018** **ODDT's service design team and the Mayor's Policy Office** facilitate learning sessions throughout the year on how City employees can use behavioral science and service design methods in their work.

**2019** **CAO, ODDT, and OIT** restructure the City's design practice areas to better integrate the teams and support their longevity.

**2020** **The Service Design Studio** (SDS) is founded at the City of Philadelphia by the Chief Administrative Officer and former ODDT team members.

# About the PHL Service Design Studio

We believe we're closer to creating a more just city when residents and colleagues, who've been marginalized by government actions, can access and deliver government services with ease and agency.

To support this belief, we collaborate with residents and staff at all levels of government to *design accessible, equitable, and trauma-responsive services* that honor the diverse needs of Philadelphians.

## ***What we do***

The City of Philadelphia's Service Design Studio supports service improvement efforts across City government. We operate as an internal-to-government consultancy, and collaborate with:

- **City agencies** to help them advance their service improvement efforts in partnership with frontline staff, those who access services, and leaders who manage service delivery.
- **Policymakers** to prototype and test policy ideas before on-the-ground implementation.
- **Program directors and administrators** to study their current-state service delivery —examining strengths that should be replicated and challenges that need to be addressed.
- **City colleagues** to coach and train them on how to use participatory service design methods in their work — building deeper relationships with communities.



# About the PHL Service Design Studio

## *How we work*

**We believe that equitable processes are required for equitable outcomes**, so we're intentional about how we work.

Our projects are highly collaborative. We focus on building trust with project stakeholders through shared decision-making, and we center the voices of those who are most disenfranchised by government actions.

Our service design projects are typically structured across four key phases of work described on the right.

## PHASE 1

### ■ *scope and plan*

We collaboratively define a project's focus of work, goals, team structure, collaboration details, project-level evaluation, deliverables, and timing needs with project partners. *Deliverables include a signed scope of work and detailed project plans.*

## PHASE 3

### ■ *design and test*

We partner with community members and City staff to design solutions that improve a service experience. Then, we test the effectiveness of our solutions before broad implementation. *Deliverables include a spectrum of outputs from redesigned application forms to enhanced workflows for frontline staff.*

## PHASE 2

### ■ *understand and define*

We conduct research to understand the lived experiences of those most impacted by a service, the challenges and strengths of service delivery, and the opportunities for improvement. *Deliverables include findings and recommendations reports based on insights gathered from mixed methods like interviews, observational fieldwork, and workshops.*

## PHASE 4

### ■ *embed and support*

We move alongside our colleagues throughout implementation by managing the short- and long-term changes required to embed service improvements in highly constrained environments. *Deliverables include change management plans, hands-on customized training, ongoing support, and evaluation outputs.*

# About the PHL Service Design Studio

## *Founding team members*

We're made up of researchers and designers whose perspectives are informed by a multitude of intersectional and dynamic identities and lived experiences — including those of first- and second-generation immigrants, queer and gender queer identities, women of color (e.g., Black, South Asian, and East Asian), and bilingual and multilingual identities (e.g., Hindi, Cantonese, and Gujarati).



**Andrea Ngan**, Service Design Strategist



**Danita J. Reese**, Service Design Strategist



**Devika Menon**, Service Design Strategist



**Liana Dragoman**, Director of Strategic Design



**Christina Stefan**, Senior Design Researcher



**Veronica Yeung**, Lead Service Designer

# *Enabling remote work due to COVID-19*

At the beginning of 2020, we shifted our long-term plans to support the City's real-time COVID-19 response in whatever way we could. In this section, we've provided details on three projects where we sought to enable the remote work of our colleagues due to COVID-19.

Those projects are:

- **Project 1:** Remote work guides for leaders and staff
- **Project 2:** Tax Review Board virtual hearings
- **Project 3:** Community engagement coordination tool

Read on to learn about the partners, background, goals, and deliverables for the three projects.

# Project 1: Remote work guides

At the beginning of 2020, leaders and staff struggled to work from home as the City rapidly responded to the realities of COVID-19.

Employees didn't have access to laptops, software, communication tools, or remote workflows. Many supervisors had never managed City employees remotely and the City didn't have established policies or norms for working from home.

## **Partners**

- Office of the Chief Administrative Officer
- Office of Human Resources
- Office of Innovation and Technology's content strategy team

## **Goal**

Develop plainly written and designed resources that coached staff and leaders on how to adapt to remote work while managing the stress of the pandemic.

## **How we worked**

We spent a month quickly researching, writing, editing, visually designing, and regularly releasing materials on four topics:

1. Getting started with remote work.
2. Leading newly remote teams.
3. Managing remote projects and project teams.
4. Communicating remotely and staying connected with colleagues.

These documents were posted on the City's internal remote work website, which was accessible to most employees.

### What we did

Within the four topic areas, we created **19 how-to documents** that covered setting up a daily routine, organizing workspaces, addressing one’s needs as a leader, creating a communication plan for and with staff, facilitating brainstorming online, and connecting with colleagues socially, among other subjects.

We published **10 templates, worksheets, and guides** that leaders and staff could use when implementing recommendations from the how-to documents.

Lastly, while this service wasn’t often used, we offered **office hours** for leaders who sought help in thinking through their remote management strategies.



Examples of the remote work guides

# Project 2: Tax Review Board virtual hearings

When residents and businesses can't pay their tax bills, they can request hearings with an independent Tax Review Board (TRB). This service is vital. Overdue tax bills put residents and businesses at risk of losing utility access, their business license, and sometimes, their homes. At a TRB hearing, residents and businesses can explain their situation and enter into payment plans with the City based on income and need.

At the beginning of the City's response to COVID-19, the TRB had to pause all hearings. Staff members couldn't work remotely because they didn't have access to laptops, and existing processes relied on paper-based workflows and in-person interactions.

“Framing virtual work as democratizing access negates [the fact that] there are ***so many people who can't access basic needs*** because they don't have the right device, access, and skills.”

■ City employee

### **Partners**

- Tax Review Board (TRB) frontline staff and leaders
- Office of Innovation and Technology's Project Management Office
- Office of Innovation and Technology's content strategy and user experience design teams

### **Goal**

Collaboratively create workflows with TRB staff and leaders — using existing City technologies like Microsoft tools — so staff could facilitate virtual hearings from the safety of their homes.

### **How we worked**

We divided the project into four key phases — each phase building off of the other.

1. **Designing research:** We met regularly with TRB leaders to gather a baseline understanding of what the TRB does. With that information, we designed research protocol so we could conduct in-depth interviews with TRB staff.
2. **Understanding the current state:** We facilitated interviews with TRB staff to learn about their roles, responsibilities, and workflows.
3. **Co-designing virtual operations:** Based on insights uncovered with staff, we collaboratively designed digital workflows that relied on existing technology with TRB staff and leaders through several workshops and review sessions.
4. **Implementing:** There were two key parts to implementation — training and the development of public-facing informational materials.

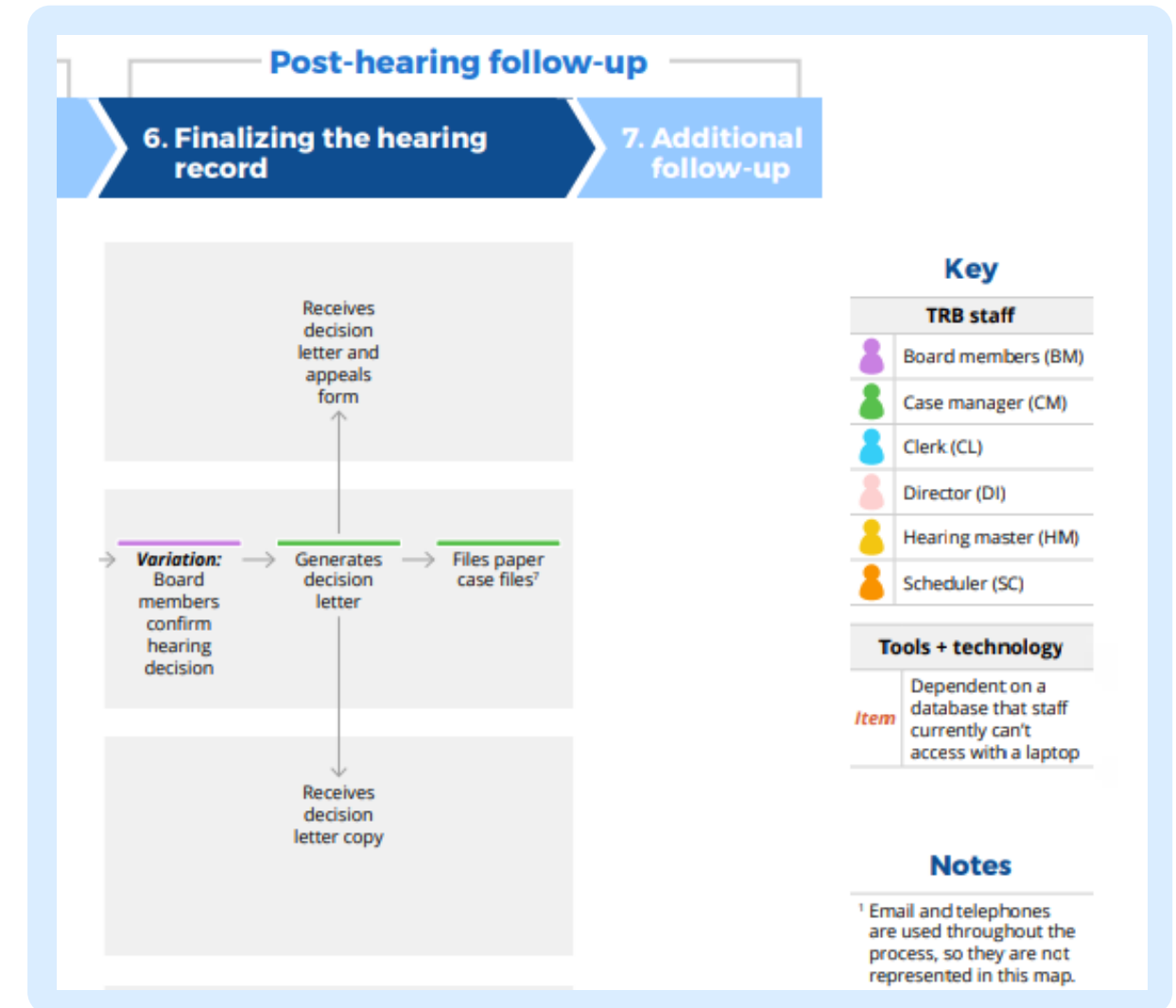
For training, we authored a custom manual that showed staff the step-by-step actions they could take (per role) to manage virtual hearings using existing technology. Once the manual was complete, we met with staff over the course of several weeks, so they could practice the digital workflows and tools before the pilot launch.

Lastly, we developed public-facing informational materials so petitioners knew of the virtual hearing option.

### What we did

We produced deliverables at each phase of the project to document our learnings. The deliverables were the outputs from our interviews, review sessions, and workshops with TRB staff and leaders.

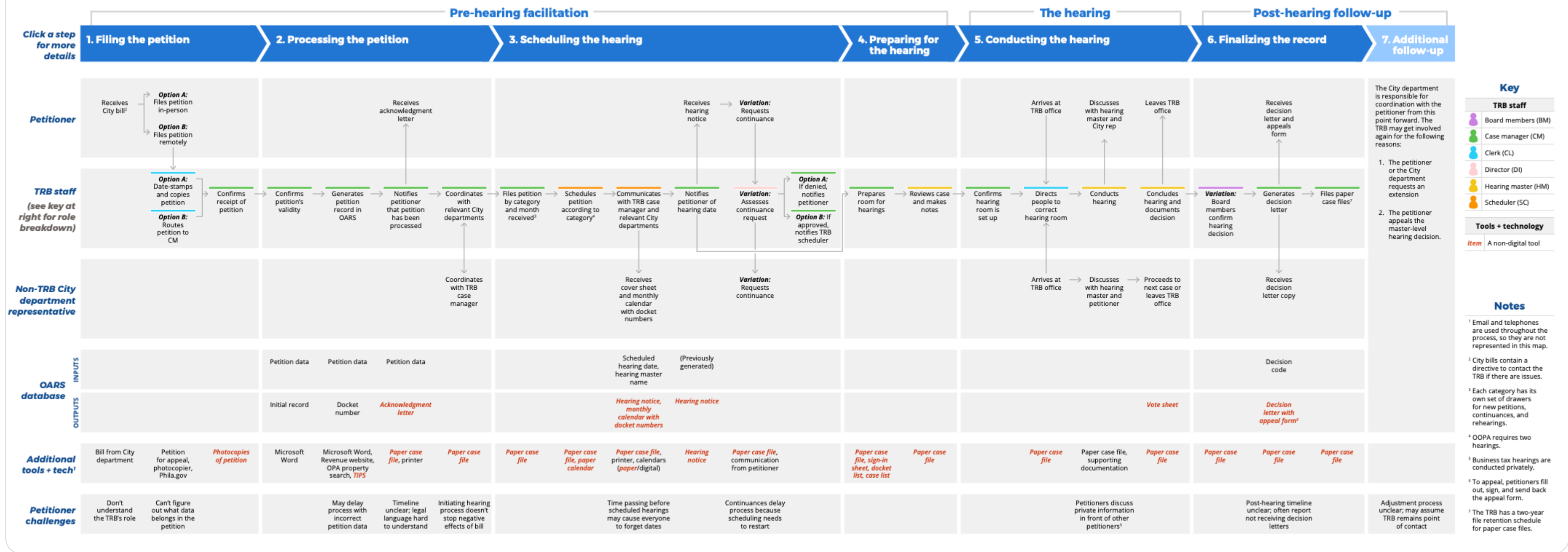
- **Current state service blueprints:** For the first two phases of work, we created a 17-page deliverable that mapped the different TRB staff roles and responsibilities, the digital and analog tools and technology used by staff to support their work, and 9 process maps or service blueprints that visualized their work at different levels of granularity. This document provided the foundation for the new digital workflows.
- **Future state service blueprints:** We generated a 14-page report that visualized the new digital workflows and how Microsoft tools would be used to enable them.
- **Training and change management:** To support implementation and the piloting of the new digital workflows, we authored a 70-page training manual that walked TRB staff through the step-by-step process of setting up and managing virtual hearings and their case files — per staff role. Again, we met regularly with staff so they could practice the workflows and tools.
- **Informational materials for the public:** Lastly, we developed public-facing informational materials that clarified the virtual hearings for the public. Those materials included a digital petition form, an about virtual hearings one-pager, revised letters written in plain language that were sent to petitioners about their hearing, and updated language on the TRB’s phila.gov service page.



Current state service blueprint visualization



## Level 2: Detailed process summary



Example of a current state service blueprint for the Tax Review Board

# Project 3: Community engagement coordination tool

According to 2019 Census data, 31.8% of Philadelphia households with an annual income under \$20,000 don't have an internet subscription. Also, some residents don't have devices that connect them to the internet, and they have limited digital literacy.

Due to the pandemic, many interactions with the City quickly transitioned to online platforms. This meant residents without digital access weren't receiving important information about the City's public health response to COVID-19. It also meant some residents couldn't access information about vital City services, like food distribution.

MOCEVS and OPE led weekly calls with City engagement staff who were working with communities across digital and non-digital platforms. Much of this engagement was happening in silos. As a result, some communities were either being missed or bombarded with information. The weekly calls helped offices learn best practices in equitable engagement tactics and coordinate their outreach so digitally disenfranchised communities could be reached.

***“Siloes make it hard to build relationships.”***

I'm also concerned about stepping on toes. Who does what? When I started work, people didn't explain how to collaborate with colleagues.”

■ City employee

### **Partners**

- Mayor's Office of Civic Engagement and Volunteer Services (MOCEVS)
- Mayor's Office of Public Engagement (OPE)
- Engagement staff across City government

### **Goals**

- Collaboratively design a tool that City agencies could use to track and coordinate COVID-19 related outreach with digitally disenfranchised communities.
- Create a governance plan with MOCEVS so the tool could remain up to date over time.

### **How we worked**

Because of the urgent need for the coordination tool, we worked quickly over the course of five weeks.

1. **Understanding the current state:** We facilitated interviews with City engagement staff to understand how they engaged the public, who they engaged, why, and what barriers interfered with their work. Based on this data, we developed version one of the coordination tool.
2. **Designing the tool:** After releasing version one of the tool, we gathered feedback from staff who were using it. With new insight, we released another version to better support staff needs.
3. **Creating a governance plan:** We collaborated with MOCEVS to author guidance on how they could maintain the tool.
4. **Implementing:** We finalized the tool and trained staff. Because staff helped design it over time, they were already aware of its value and how it could support their work.

## What we did

There were two key deliverables:

1. **Several iterations of the coordination tool:** The tool was a Google Smartsheet with seven tabs that included:

- Information on how to use the tool.
- The City’s communication priorities each week.
- Engagement efforts across type, audience, coordinating office, and event details.
- An audience search where City engagement staff could see what City offices were engaging with which communities.
- Engagement resources where practitioners could view different channels of communication across offices, like email lists or phone banks.
- A directory of engagement practitioners.
- A feedback tab so staff could recommend changes to the tool.

2. **Governance plan for the tool:** We created a 26-page document that offered guidance on who would update the tool, how it could be maintained, and communications MOCEVS could use to elicit ongoing contributions from City staff.

Department	Engagement tactic	Engagement description	Frequency	Date & time	Event access
Faith-based and Interfaith Affairs	Virtual event	Offerings of prayer from diverse religious groups on the Office of Public Engagement Facebook page.	Weekly	Every Friday, Saturday, and Sunday at 3 pm	Open Facebook
Fire Department	Other: See engagement description	Distributing the COVID-19 Service Needs Flyer/survey in English and Spanish to households around the city.	-	-	-
Food Policy Advisory Council (DOS)	Virtual event	We host monthly gatherings with 100 attendees to identify and address needs in the food system. They focus on work that	Monthly	-	-
Food Policy Advisory Council (DOS)	Phonebanking	-	-	-	-
Food Policy Advisory Council (DOS)	Phonebanking	-	-	-	-
Free Library	Other: See engagement description	-	-	-	-
	Other: See	-	-	-	-

## 2. Roles and responsibilities

This section outlines key roles involved in the governance of the engagement tracker. We’re defining these roles so that each person involved has clarity on what they’re responsible for and accountable to in order to successfully maintain the engagement tracker.

Responsibilities include:

- Reviewing the tracker at least once every weekday (see daily review checklist below).
- Answering questions and addressing issues City staff have when using the tracker (e.g. updating edit access or directing someone to the correct tab).
- Communicating information regarding the tracker to the weekly equitable engagement collaborative and the monthly City Engagement Initiative (CEI).
- Encouraging City staff and departments to use the tracker on a regular basis (e.g. share use cases or examples of how leadership or the Comms office has used the information in the tracker to inform a decision).
- Using the tracker’s dashboard to inform engagement coordination work.

### Daily review checklist

- Update the communications tab based on the daily press release and other communications resources.
- Ensure newly added information is complete in the engagement efforts, resources, and directory tabs.
  - If information is incomplete, reach out to the point of contact via comments requesting them to fill out key missing information.
- Move the rows with information that’s no longer relevant to the top (e.g. past events), then hide those rows—specifically in the engagement efforts and communication priorities tabs.

*Governance plan to manage the tracker*

# *Leading service improvement efforts*

This section includes information about:

- Project 4: Juvenile Assessment Center and Youth Arrest Reform project
- Project 5: Mail-in ballot voter guide
- Project 6: Equitable community engagement toolkit
- Project 7: Tax Review Board operations redesign

We seek to design services that create the conditions for care and equity and affirm the shared needs of the people most impacted by our work in government.

### ***Overview***

At the beginning of 2020 we focused on supporting the City's rapid COVID-19 response. Mid-year we shifted back to our planned project work. In this section, we've provided details on four projects where we partnered with our colleagues to redesign City services and prototype reforms to policy.

Those projects fall into two categories:

#### ***1. Prototyping policy change***

- Project 4: Juvenile Assessment Center and Youth Arrest Reform project

#### ***2. Service improvements***

- Project 5: Mail-in ballot voter guide
- Project 6: Equitable community engagement toolkit
- Project 7: Tax Review Board operations redesign

Read on to learn more about the partners, background, goals, process, and deliverables for each project.

# Project 4: Juvenile Assessment Center and Youth Arrest Reform project

4,000 youth are arrested each year in Philadelphia. When younger people are arrested, regardless of their level of offense, they're taken to police stations where they're isolated for hours in cement cells with minimal communication.

The Juvenile Assessment Center and Youth Arrest Reform project is a part of broader criminal legal reform efforts at the City. This effort seeks to improve the experience and outcomes of youth who are interacting with the criminal legal system. The proposed reforms mitigate the trauma of youth after arrest, increase diversion rates, and improve youth and guardians' access to resources immediately after arrest. The Juvenile Assessment Center (JAC) will eventually be a physical space dedicated to youth justice.

### **Partners**

- Office of Criminal Justice
- Dr. Meagan Corrado, trauma-informed care consultant
- Office of the District Attorney
- Philadelphia Police Department
- Mayor's Policy Office

### **Goals**

- Facilitate conversations with the Office of Criminal Justice and collaborating agencies to document their operational decision-making, uncover gaps in thinking, and brainstorm changes to the youth arrest process.
- Visualize a series of process maps or service blueprints that demonstrate how the reforms will work in practice and per stakeholder group, like arresting officers, social work staff, guardians, and youth.

### **How we worked**

Our process consisted of three phases. Across those phases, we met with the Office of Criminal Justice on a weekly basis for six months. We facilitated more than 10 conversations with the Office of Criminal Justice, Dr. Meagan Corrado, Office of the District Attorney, and Philadelphia Police Department to work through operational details.

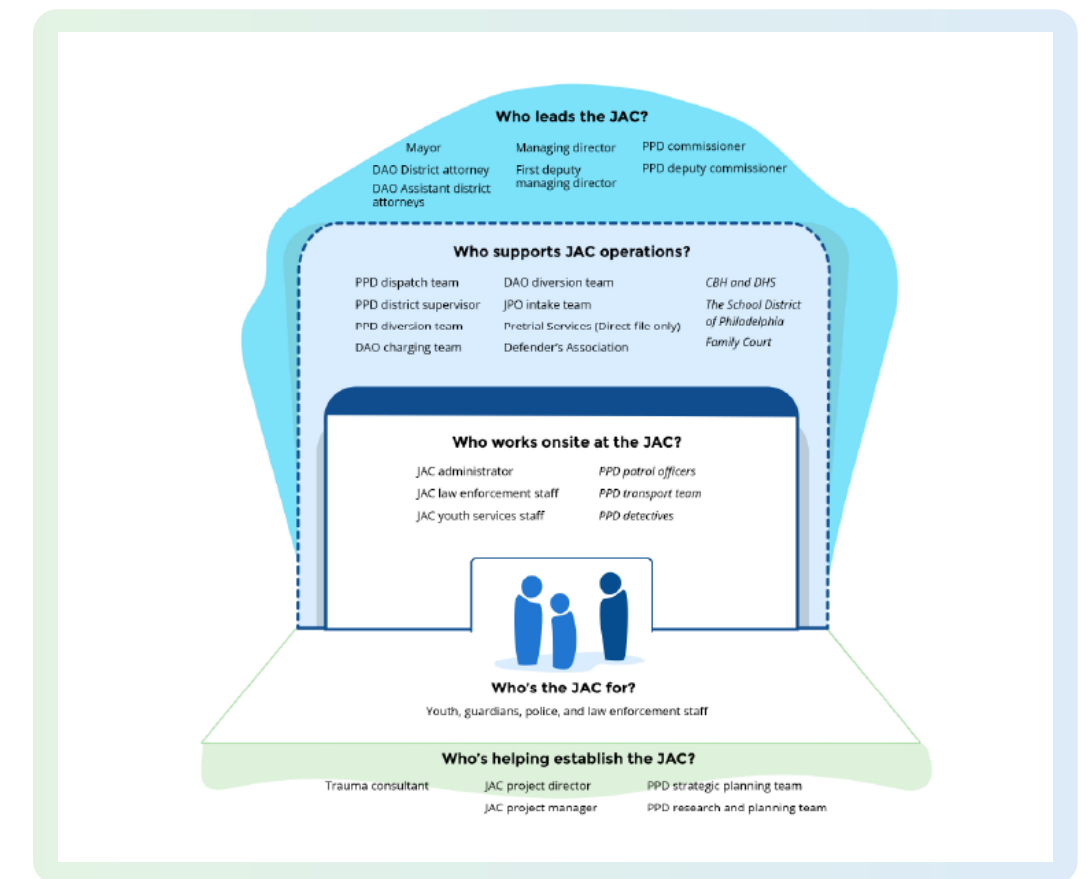
- 1. Mapping key stakeholders:** The organizational ecosystem of the JAC is broad and deep across City agencies. Different agencies own different protocols and aspects of the youth arrest process. As a result, it was important to clarify who would deliver specific moments in the youth diversion and arrest process.
- 2. Creating operational prototypes:** We worked with collaborating agencies to understand what protocols couldn't change, what decisions still needed to be made, and how organizations would work together to deliver a less harmful approach to the youth diversion and arrest.
- 3. Developing a trauma-informed strategy:** We worked with Dr. Meagan Corrado and the Office of Criminal Justice to build a trauma-informed approach to JAC operations.



## What we did

Our deliverables are grouped in three categories:

- 1. Stakeholder ecosystem map:** This 21-page document outlined the people and organizations who are reforming the juvenile legal system and who support operations at the JAC. The document included:
  - An overview of partnering agencies and their roles.
  - Agencies that own specific procedures.
  - People who work at the JAC.
  - People who support JAC operations.
  - JAC leadership across City agencies.
- 2. Service blueprints or operational prototypes:** We created two sets of interrelated documents that mapped proposed reforms and operations. They were:
  - A 60-page report that provided the overarching strategy for youth reforms and JAC operations.
  - 17 service blueprints (at different levels of granularity) that showed specific operational pathways for several youth diversion and arrest outcomes.
- 3. Trauma-informed strategy:** This 35-page report outlined the overarching trauma-informed service strategy of the Juvenile Assessment Center and Youth Arrest Reform project work developed in partnership with Dr. Meagan Corrado. The report included:
  - Definitions of trauma.
  - The relationship between the criminal legal system and trauma.
  - Guiding principles that support practices that are less traumatizing to youth.
  - Next steps for applying the trauma-informed principles to on-the-ground operations.



JAC stakeholder map

# Project 5: Mail-in ballot voter guide

The November 2020 general election was an important election that presented several challenges:

- More voters turn out for presidential elections.
- Many voters were expected to vote by mail.
- Pennsylvania started to allow mail-in ballots in October 2019.
- In Philadelphia, the mail-in ballot was available in English. However, according to the 2019 Census, 15% of our population age five (+) speak a language other than English at home.

These realities coupled with extensive misinformation campaigns about voting by mail and anti-immigrant discrimination, made it important to clarify the mail-in ballot and voting process.

## *City partners*

- Office of Immigrant Affairs (OIA)
- Office of Innovation and Technology's content strategy, user experience design, and software development teams
- Law Department
- Office of the City Commissioners
- Mayor's Office of Civic Engagement and Volunteer Services
- Mayor's Policy Office

## *Community partners*

- Coalition of African and Caribbean Communities (Africom)
- VietLead
- Southeast Asian Mutual Assistance Association Coalition (SEAMAAC)
- Philadelphia Chinatown Development Corporation (PCDC)
- Citizens for Language Access

## *Goals*

- Create a highly visual guide that clarifies general election information, how to apply to vote by mail, and how to fill in and seal a mail-in ballot.
- Write the guide in plain English, translate it into the top eleven languages spoken in Philadelphia, and work closely with immigrant-centered community groups to ensure the translations were accurate.
- Test the usability of the guide with potential voters who have limited English proficiency and low digital access before broad implementation.



*Preparing for and facilitating usability testing in multiple languages*

### ***How we worked***

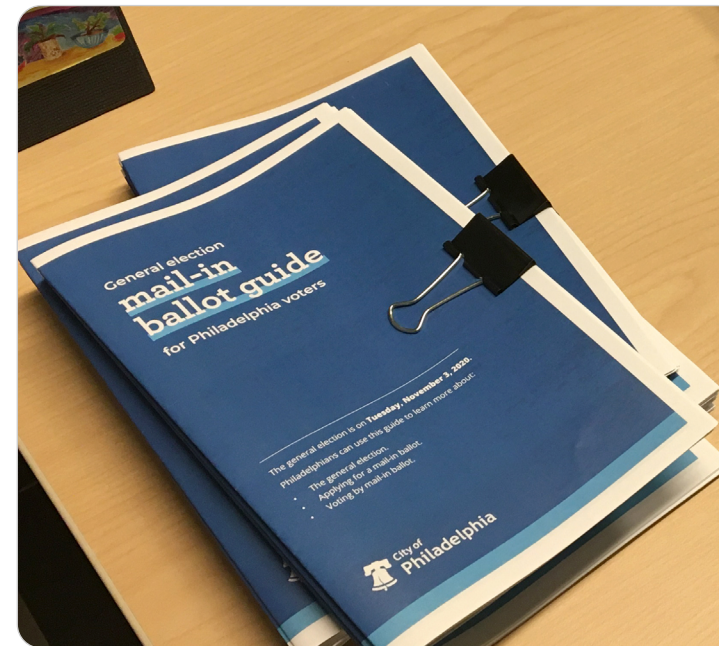
Our design process was:

1. **Prototyping:** We created a prototype of the print guide in plain English, Spanish, Chinese (simplified), Vietnamese, and French.
2. **Designing research:** We identified activities that would reveal how potential voters might use the guide to fill in their mail-in ballot.
3. **Facilitating usability testing:** We worked with several immigrant-centered community partners to conduct usability testing sessions in Spanish, Chinese (simplified), Vietnamese, and French. We trained partners on how to facilitate usability testing and provided translated testing materials. We compensated partners and research participants for their expertise and time.
4. **Finalizing:** We revised the content based on what we heard from sessions and updated local and state election guidance. The guides launched in early September 2020.
5. **Distributing:** OIA distributed the print version of the mail-in ballot voter guide at satellite election offices. The print version was available in English, Spanish, Chinese (simplified), Vietnamese, French, Russian, and Korean. The digital guide was available on [phila.gov](http://phila.gov) in the top twelve languages in Philadelphia, including English.

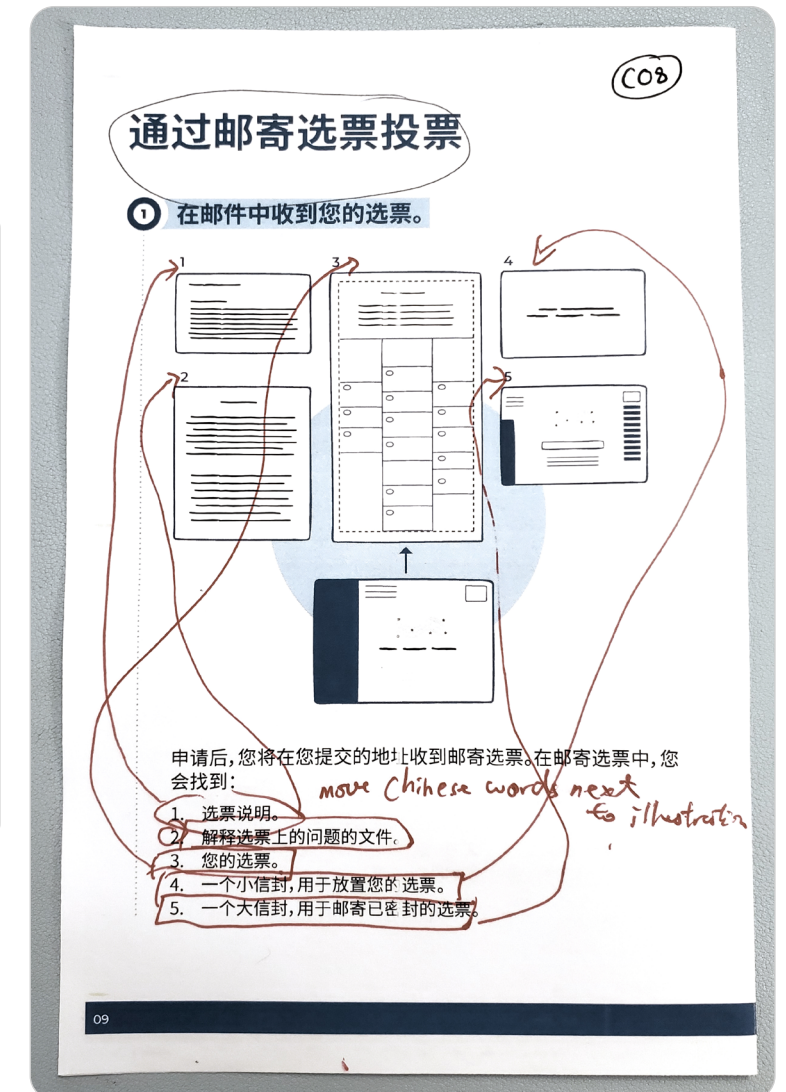
### What we did

We created an informational ecosystem to build awareness of the guide and distribute it (digitally and non-digitally) to a broad, multilingual audience.

- **Postcards:** The postcard was designed to make voters aware of the mail-in process and direct them to the digital guide on phila.gov. The postcards were available in English, Spanish, Chinese (simplified), Vietnamese, and French. Local community groups distributed over 2,500 postcards to community members.
- **Print guide:** The print guide provided information about important voting deadlines, plain language explanations of the ballot questions, how to apply to vote by mail, how to fill in a mail-in ballot, and how to sign and seal a ballot. We printed 5,000 guides in English, Spanish, Chinese (simplified), Vietnamese, French, Russian, and Korean.
- **Digital guide:** The digital guide contained the same information as the print guide. The digital guide was available in twelve languages on phila.gov, including English. Over 16,000 people, or 3.59% of all phila.gov traffic, accessed the digital guide from September to November 2020.



Printed prototypes that were tested in usability testing



Design feedback from a Chinese-speaking voter

# Project 6: Equitable community engagement toolkit

Systemic inequities rooted in white supremacy exacerbate disparities for many systemically marginalized communities. These inequities take many forms, including state violence towards Black and Brown communities and inequitable public health outcomes as evidenced by COVID-19.

When government fails to provide opportunities for Black, Brown, Indigenous, Asian, LGBTQIA, and disability communities to inform decisions that disproportionately impact their lives, then the design of policy and service delivery can uphold the practice of marginalization.

Equitable forms of community engagement can be an important mechanism for government to listen, rebuild trust, collaboratively design policy solutions, share decision-making power, and honor community agency with the people it serves. However, the on-the-ground realities — like lack of time, money, and staff capacity as well as discomfort with power-sharing — can present challenges to staff who are trying to increase equity through meaningful community engagement.

***“Be a learner not a knower.*** Allow the community to identify their own needs.”

■ City employee

“We need to be explicit about how we transfer knowledge to communities. ***We need to build power within the community.***”

■ City employee

### **Partners**

- Mayor's Office of Civic Engagement and Volunteer Services (MOCEVS)
- Mayor's Office of Public Engagement (OPE)
- Engagement practitioners across City government

### **Goals**

- Define what equitable community engagement looks like with historically underinvested communities.
- Co-design shared practices, tools, and training to support City staff in their efforts.
- Develop internal mechanisms to ensure input gathered from community members informs the design of policy, programs, and services.
- Create evaluation strategies and tools so we can hold ourselves accountable, as an institution, to equitable engagement processes and outcomes.

### **How we worked**

Because of COVID-19 in-person restrictions, we intentionally collaborated with City staff in 2020. To date, we've worked with over 54 staff across 32 agencies through one-on-one interviews, focus groups, project advisor reviews, working group sessions, collaborative document sharing, and ongoing presentations through City-wide meetings.

For the past year, we planned our work across several core phases.

- 1. Gathering a baseline understanding:** We met with City engagement staff to understand their engagement practices.
- 2. Co-designing a vision:** With deep understanding, we co-authored the City's equitable community engagement vision and guiding principles with City engagement staff.
- 3. Developing a toolkit strategy:** We devised the toolkit's content areas.
- 4. Building the toolkit:** We're co-authoring core content areas of the toolkit and iterating on the usefulness of that content with City staff.

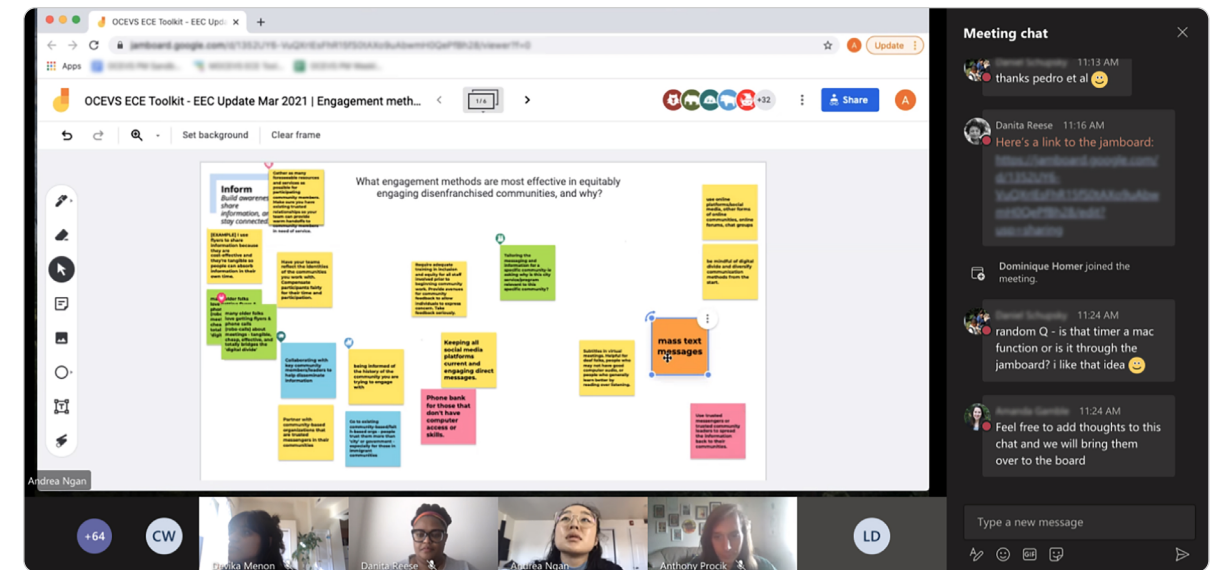
We received an Innovation Fund grant from the Mayor's Fund for Philadelphia to further this work. We'll use this funding in 2021 to build aspects of the toolkit with communities across Philadelphia.

### What we did

Aside from designing and facilitating many hours of collaborative sessions with City engagement practitioners, our output has been the following:

- **Vision and principles:** This 15-page document articulates a shared definition and principles on what equitable community engagement means to City engagement staff.
- **Prototype:** We crowdsourced best practices and tools to create an initial prototype of the toolkit. The prototype is a sketch that maps the Toolkit's core content areas. We'll co-author the content with staff and residents. Sample content includes:
  - How to reflect on bias, power, and privilege.
  - How to create an evaluation plan.
  - How to understand community history.
- **Core practices:** Based on the prototype, we've started to author over 10 guidance documents that address the toolkit's core practice areas. These documents are collaborative and have been shared with City staff so they can review, edit, and contribute additional content.

This project is still in progress.



#### Defining equitable community engagement

Equitable community engagement is more than a set of norms or a singular model. It's a shared commitment to dismantle barriers that prevent disenfranchised communities from participating in government decision-making processes. For City staff, equitable community engagement strengthens our ability to collaboratively govern with those most impacted by government decisions.

Equitable community engagement is both an ongoing practice and an outcome. As a **practice**, it advocates for the conditions and resources necessary for historically underrepresented voices to be heard and made consequential. As an **outcome**, equitable community engagement creates the circumstances for meaningful community participation. It invites input into the design of policies, programs, services, budgets, and strategic priorities that directly impact communities.

In summary, we define equitable community engagement as:

- **A sustained commitment:** Investing time and resources in equitable engagement processes, while holistically supporting the people who practice this work.
- **Inviting collaboration:** Making decisions *with*, not *for*, communities who are directly impacted by government policies, programs, and services.
- **Being inclusive:** Proactively centering the voices of people—across a range of identities and abilities—who have historically been disenfranchised by government and its policies.
- **Taking action:** Creating internal processes to take action on community input when designing policies, programs, and services.
- **Holding ourselves accountable:** Ensuring our plans, processes, and output reflect our values and vision for equitable community engagement.

#### Principle 1: Invest in intentional engagement processes

*"Following up with community takes time and funding, we need to be sure that piece is there."*  
— City staff

Limited resources and capacity can lead to brief, one-time engagements or reactive processes. Without commitment from City leadership to provide adequate time, money, training, or staff, engagement practitioners may not have enough support to follow up and follow through with communities. For disenfranchised communities, this lack of investment can increase distrust and lead to or perpetuate disengagement.

We see engagement as a continuous process that evolves with community input. It should work to repair and rebuild relationships with disenfranchised communities. With this perspective, we can create conditions that allow communities to inform our process and output, while also supporting staff on the frontlines of engaging with communities.

*We commit to:*

- Dedicating resources like time, budget, staff support (e.g. training), and capacity towards engagement work.
- Seeing trust and relationship-building as key metrics of successful engagement.
- Identifying clear opportunities and pathways for communities to contribute their expertise and inform decisions.

*In practice, this looks like:*

- Being transparent and honest with community members about decisions that have been made and the scope of change the City can and cannot promise.
- Dedicating time to meaningfully engage communities from the beginning and throughout the process. Their voice and values should be infused at all steps. (e.g., collaboratively defining the scope of work, defining metrics of success, and finding consensus on all major decisions.)
- Providing avenues for mental health support to frontline staff who are engaging with communities.
- Working alongside communities to design new tools and programs, rather than only soliciting feedback on a completed product.
- Allocating resources to pay community organizations or individuals who serve as advisors or steering committee members.
- Evaluating past engagement work with practitioners, decision-makers, and community members to reflect on lessons learned and best practices for future opportunities.

*Virtual brainstorms and collaborative documents outlining what equitable community engagement looks like to City engagement staff*


# Project 7: Tax Review Board operations redesign

Previous to this project, we worked with the TRB for several months to develop virtual hearings using existing technology. However, our short-term solutions didn't address underlying challenges.

Some of those challenges are:

- TRB staff have varied levels of comfort with new technology.
- Residents who access TRB hearings include people who have limited digital literacy and don't have access to digital devices or the internet.
- Out-of-date technology impedes staff workflows and operations — forcing staff to rely on paper-based processes, file storage, and hearing scheduling.

“[Residents] who are most likely to need TRB hearings are often [residents] who are most vulnerable and may not be able to keep their phone on or maintain stable access to the internet.”

 City employee



### **Partners**

- Tax Review Board (TRB) staff and leaders
- Office of Innovation and Technology's content strategy, user experience design, and software development teams
- Staff from the TRB's collaborating agencies
- Community organizations that represent residents with the TRB
- Digital inclusion subject matter experts

### **Goals**

- Reimagine a digital and non-digital service experience for staff and residents that centers digital inclusion.
- Design and build new technology and tools that enable reimagined service experiences.
- Manage service changes with staff, collaborating agencies, and residents as the new technology and workflows launch.

### **How we worked**

We collaborated with over 30 TRB staff and subject matter experts to generate recommendations. Our methods included one-on-one phone interviews with frontline TRB staff, visioning interviews and discussions with the different stakeholder groups to define an ideal service experience, and brainstorming sessions with OIT to ensure our solutions were technically feasible.

Our phases of work:

- 1. Understanding the digital divide in Philadelphia:** In our previous project with the TRB, we mapped the current state TRB service experience for residents and staff. For this phase of work, we looked at the current state through the lens of digital inclusion. As such, we interviewed community groups who assist residents when interacting with the TRB and digital inclusion experts.
- 2. Designing cross-channel services:** Based on our previous work and insights gathered about digital inclusion, we collaboratively designed the new digital and non-digital service experience with TRB staff and OIT. OIT provided feedback on technical feasibility.
- 3. Enabling OIT to develop the supporting technology:** We integrated OIT into the project work and transitioned the project, so they could lead the design and development of the new technology.

### ***What we did***

We created a comprehensive set of deliverables that documented our efforts with TRB staff and other subject matter experts. The deliverables were also meant to inform the development of new technology, which is being led by OIT.

Those deliverables were:

- **Organizational diagram:** A visualization that shows how the TRB categories sit within the Office of Administrative Review.
- **Stakeholder map:** A visualization and written descriptions of the different people involved in TRB operations.
- **Petitioner attributes:** Descriptions of key characteristics of TRB petitioners, like digital access, digital literacy, and knowledge of taxes.
- **Service overlaps with collaborating agencies:** A diagram that shows how the TRB fits into other department processes and vice versa.
- **Future-state service blueprints:** Visualization that shows the new integrated digital and non-digital service experience for residents and staff — emphasizing how the technology would fit into the revision.
- **Summary list of technology needs:** A written explanation of what different stakeholders need to do with the new technology, like “City staff should have access to petition and decision letters.”
- **Additional support considerations:** Recommendations and process changes that aren’t specific to the new technology.

# *Supporting our team, colleagues & communities*

In addition to project work, we supported a variety of initiatives where we coached our colleagues on how to use collaborative methods to share decision-making power with communities, connected with our broader design community, enabled racial equity work within government, and developed our standards of practice as a team.

We worked across four areas:

- **Area 1:** Building capacity for service design at the City
- **Area 2:** Supporting City-wide strategies and policy change
- **Area 3:** Connecting with the design community
- **Area 4:** Laying the foundation for our team

Read on to learn about these areas of work.

# Area 1: Building capacity for service design at the City

A core aspect of what we do at the City is coach and train our colleagues on how to use participatory service design methods in their work.

For the past year, we focused our capacity-building efforts in several areas.

- **Project work:** When we work on projects, at least one colleague from a partnering agency is a core project team member. We use this opportunity to model the use of service design methods within the practice space of a project.
- **As-needed conversations:** About once a month we meet with agencies who are interested in how we approach our work, how we've tackled specific challenges (e.g., digital access issues), and our lessons learned. During these conversations, we'll share deliverables, project plans, and answer questions.
- **Advocacy:** The team presents at City-wide meetings every quarter, so colleagues and the City's administration can become more familiar with our work.
- **Consulting:** Through consulting, we meet with an agency every other week to support a specific initiative and offer ongoing thought partnership.

Below are examples of some of our consulting over the past year.

- We helped the **Office of Arts, Culture, and the Creative Economy** design workshops with City leaders and the public. These workshops focused on creating the criteria to help the City rethink City-owned landmarks that represent racist and colonialist histories.
- We worked with the **Office of Public Property** and the **Courts** to develop signage and wayfinding best practices that clearly communicated how visitors should navigate City spaces safely from a public health perspective in the context of COVID-19.
- We've been coaching the **Office of Community Empowerment and Opportunity's Financial Inclusion Unit** on how to design listening sessions with the public — funded under a grant from Cities and Counties for Fine and Fee Justice. Through this grant, the City is working towards eliminating various criminal legal fines and fees. The listening sessions will provide space for communities to share the impact that fines and fees have had on their lives.

# Area 2: Supporting City-wide strategies and policy change

We participated as members of several City-wide initiatives, collaboratives, and committees that align with our commitment to enabling social and racial justice within the walls of City government.

- **Racial Equity Advisory Committee**, Working Group, and Budget Committee, led by the Mayor's Office of Diversity, Equity, and Inclusion, is working to embed racial equity in how the City operates and functions.
- **Participatory Budgeting Committee**, led by the Budget Office and the Department of Planning and Development, works with the public to direct the City's use of one million dollars in capital funding.
- **Equitable Community Engagement Collaborative**, led by the Mayor's Office of Civic Engagement and Volunteer Services, is a convening of City engagement practitioners who share best practices in equitable community engagement.
- **GovLabPHL, led by the Mayor's Policy Office**, is a collective of colleagues who support evidence-based practices and evaluation in City government.

We believe we're closer to creating a more just city when our most disenfranchised residents and colleagues can access and deliver government services with ease and agency.

# Area 3: Connecting with the design community

We're a part of a broader community of service designers who are working in government, who are honing their skills in school, and who are interested in transitioning into the field.

Throughout 2020, we connected with a wide range of professionals and students to share our work and learn how others were navigating the challenges of the year. In addition, we held office hours with professionals who were interested in transitioning into the field of service design and wanted to learn more about what we do as a team.

We presented our work publicly:

- The **Design Philadelphia festival**, organized by the Center for Architecture and Design, occurred from October 7-18, 2020. Our presentation was entitled Service design in government: For the people, by the people. We discussed how we leverage participatory design methods to center equity in our work.
- In February of 2021, The Baltimore Mayor's Office of Performance and Innovation invited us to speak at their **Design for Breakfast** event, which is a monthly convening of City employees and the public around design.

We met with government design teams to share lessons learned:

- Civic Service Design Studio in the NYC Mayor's Office of Economic Opportunity
- The Baltimore Mayor's Office of Performance and Innovation
- The Lab at DC in the Office of the City Administrator
- The Lab at OPM in the United States Office of Personnel Management

Finally, we shared our work at the following institutions:

- University of the Arts
- University of Pennsylvania
- Maryland Institute College of Art
- Parsons School of Design

# Area 4: Laying the foundation for our team

The current team is a founding team. As a result, we developed standards of practice to ensure we're speaking the same language and embodying our purpose.

The standards of practice we're currently working on are:

- **Ethical design research:** A comprehensive playbook on how we conduct ethical design research at the City and how we hold ourselves accountable to the standards.
- **Service patterns:** Service patterns are designs of common aspects of services that can be reused. They document best practices for service delivery. We began to sketch service patterns for what accessible, equitable, and trauma-informed service delivery could look like at the City of Philadelphia.
- **Project management standards:** We're committed to leading projects that honor our purpose and beliefs. As a result, we created project management standards that help us scope, design, and manage projects in alignment with our mission as a team.
- **Inclusive workshop facilitation:** We studied methods for shared decision-making and inclusive workshop design and facilitation. We made a playbook from our findings.

Additionally, we met on a weekly basis to learn from each other and expand our understanding of design. We explored topics like disability justice, equity-centered community design, life-centered design, trauma-informed design, inclusive design, and design for enabling courageous change, among other topics.

PROJECT MANAGEMENT PLAYBOOK: PART 3

## Project management strategies

The project lead is generally responsible for drafting and maintaining the plan, while the project team shares responsibility for providing regular input to inform deliverables, time estimations, and updates.

### Components of a project plan

A project plan describes what work needs to be done, when work needs to happen, and who will carry work out across key phases:

#### What work needs to be done:

- **Milestones:** A milestone is a conceptual marker in a project that signifies a change or stage in development. Milestones call out major events, dates, decisions, or deliverables. As we plan each project phase, identify the key milestones and document when they have to be delivered. Examples include important meetings or presentations, the completion of key deliverables, and the start and end of project phases.
- **Deliverables:** Deliverables are the outputs of work. They're often what we commit to completing over the course of a project and described in the project scope. They're often documentation (e.g., a service blueprint) or a product that we've developed (e.g., a usable tool), but they can also be conversations (e.g., alignment workshops or consultations).
- **Key tasks:** Tasks are activities that contribute to deliverable creation. As we consider the deliverables, what are all the things we need to do to get to that deliverable?

*Project management playbook*

*Planning for the future*



We're in the process of planning year two as a team. While we're approaching our work with greater conviction, 2020 taught us to be flexible. With that said, below is a high-level view of what we're planning.

### ***Leading service improvement efforts and prototyping policy change***

Two of our projects from 2020 have carried over into calendar year 2021. They're the Equitable Community Engagement Toolkit and the cross-channel redesign of the Tax Review Board operations.

- We'll continue our work on the Equitable Community Engagement Toolkit through an Innovation Fund grant from the City. This grant will support our collaborative design efforts with community-based organizations and residents. By the end of the calendar year, the toolkit and equity training should be in place.
- We transitioned our project with the Tax Review Board to the user experience design, content strategy, and software development teams in the Office of Innovation and Technology. They'll design and develop the new custom software that will support staff workflows. At the end of the calendar year, we'll test the usability of the new technology with staff and the public as well as manage the change required to implement the technology.

Lastly, we're currently scoping a variety of projects that will address topics from the voter experience to the City's zoning operations.

### ***Building capacity for service design at the City***

We hope to have the curriculum and coursework in place to launch a Service Design School at the City of Philadelphia in 2022. We'll use the format of "school" to train City colleagues across the hierarchy of government on service design methods for use in their work.

### ***Supporting strategic City-wide initiatives***

We'll continue to participate in committees, initiatives, and collaboratives that promote shared decision-making with communities of color, evidence-based decision-making, and racial justice at the City of Philadelphia.

### ***Connecting with the design community***

During our year one, we intentionally connected with service design teams who are working across local, state, and federal governments. It's our hope that we'll establish richer and ongoing collaborations with these teams.

### ***Laying the foundation for our team***

In support of our team's work and the launch of the Service Design School, we'll continue to develop and test our standards of practice — ensuring we're holding ourselves accountable to our purpose and beliefs.

# *Thank you*

Thank you to the Chief Administrative Officer, Stephanie Tipton, for her continued support.

Thank you to our champions, project partners, community collaborators, colleagues, and friends who've moved alongside us during our first year.



**Email:** [service.design@phila.gov](mailto:service.design@phila.gov) with questions about this report.

**Web:** [phila.gov/service-design-studio](http://phila.gov/service-design-studio)

**Twitter:** [@DesignStudioPHL](https://twitter.com/DesignStudioPHL)