

Other Eyes: creating a policy canvas with *Juris Visuall*

A first time user's experience

Step back a couple of decades

An incoming new government:

UK government officials and Ministers are finding ways of working with each other following a change of political administration.

A policy event for officials:

a speaker describes new Ministers' astonishment on discovering that their Departments don't maintain a canvas of policies—they start from scratch each time to see how a new policy fits.

Floating a 'canvas' inside the tax agency:

policy makers know their own area in detail (and can celebrate how arcane it is). There are few incentives for them to 'let light in on the magic' collectively—suiting the person in overall charge of policy who enjoys the power to summon directors individually for advice on technical aspects.

Fast forward twenty years

Inside the tax agency:

government IT experts introduce *Visuall* to tax policy officials. It generates a large wall chart comparing all an enterprise's products and processes. Is this what a 'policy canvas' looks like?

A 'market scan' for similar products:

due diligence finds some specialised 'business analysis' solutions—but nothing that policy and administrative staff can use themselves, as with word processing and spread sheet applications.

Checking with others:

overseas regulators are enthusiastic about using *Visuall* to identify where products and processes misalign, and to show them how the whole system they administer looks to the public.

The methodology:

the wall chart is a matrix showing policy areas in rows with process steps in intersecting columns. Attractively simple ...er, why the software—could we do the same on a spread sheet?

Trying it out:

two products chosen for a pilot show up differences previously taken for granted, successfully making the case for going ahead with a full wall chart. Government security experts authorise use of the offshore cloud to host the knowledge base, rather than an on-premise installation. Those of us with admin licences can securely add and edit in most browsers on a variety of devices.

The complete policy canvas:

defining our own menus in the application covers all the agency's dozen product lines (Income Tax; Value Added Tax; Corporation Tax; Customs Duties and so on). Gradually refining process labels as we added each product means every product line expands into the same nine process steps—specialist process steps are not so unique after all!

The fun starts:

developing the matrix shows staff have different mental models of the tax system depending on their specialism. Quite some barrier to thinking holistically. How does that work for the public?

'Areas of Interest':

items we add to our user-defined 'areas of interest' (law, forms, letters, and so on) tot up to 3,500 (200 statutes; 200 returns; 600 forms; 800 items of guidance; 1,400 template letters).

Click and connect:

A click connects each item to its process step for the product. The wall chart will display the item as a coloured blob in the box formed by the intersection of the product and process step, red for Legislation (with an identifying code); pink Guidance; gold Returns; tangerine Forms, and so on.

Learning about ourselves:

we discover that staff don't—and have no reason to—distinguish between legal obligations and the agency's administrative policies (one easier to change than the other). They can confuse a process (the mechanism for collecting tax) with the product, thinking not in terms of Income Tax but 'Self Assessment' or 'Pay As You Earn', such does the process dominate their professional lives. A neat question is to ask staff which they think the most complicated policy area across the agency. Checking visually shows the the least expected area is the most elaborate!

How about that software?

Visuall's cross-silo online knowledge base assures the completeness of the wall chart by reporting orphaned items. In its read-only version the software doubles as a browser-based application all staff can search to see details (revenue, volumes, frequency, look) of products, letters and forms. It can also export search results to a Word or Excel document. A telling example is a search that lists 211 registration forms (not the five everyone knows) 'related' to the registration process step.

Cultural Implications

Neither wall chart—the policy canvas—nor its underlying knowledge base change the way people work, requiring management of change. Instead the chart presents information in a way no-one has seen it before, digitally empowering staff to identify contradictions, inconsistencies and duplications, and align products and processes, if feasible and they choose to.

But introducing more transparency into a culture tells you about the culture into which you've introduced it. Few senior incumbents, with acquired expertise, have interest in shaking down those silos, or a job objective to do so. To an extent, power has accumulated in the silos.

And the logical conclusion from having a policy canvas is the need for a new role for stewardship of the whole system, a system co-ordinator, a role which did not, or could not, exist before—other than in terms of conventional, fragmented, accountabilities. Without far-sighted leadership it takes a crisis to challenge traditional management approaches, perhaps one of the frequent official reports about 'failure of imagination' (9/11), a financial crisis, or staff not taking a holistic view (UK social services) while traditional ideas of governance perpetuate accountability by silo.

Conclusion

Aware of the risks attending narrow accountabilities, enterprises can try to mitigate them by rewarding corporate behaviour—but how can people truly behave corporately without a common overview, and how can they be assessed on corporate behaviour without such an overview? Judging directors on cost reductions in their area discourages corporate behaviour because the changes to align products and processes cost money—though corporate savings are greater!

The only true voyage of discovery...would be not to visit strange lands
but to possess other eyes.

Marcel Proust