# Design systems summit note - September 4, 2019

## Immediate short-term action items

### Establish who is accountable and responsible for a design system standard (find a champion, determine who owns it, who pays)

* The Digital Transformation Office (DTO) has the policy driver to take the lead, and is prepared to seek funding to devote resources to coordinating efforts for all of the GC
* Discussions at senior levels can be initiated by Mark Stokes, a/Assistant Secretary, Strategic Communications and Ministerial Affairs, Treasury Board of Canada Secretariat

### Dedicated time and resources

* DTO has dedicated time for 6 resources to focus primarily on design system matters for the next 3 months. The amount of time, number of resources, and which resources will be revisited in December/January and adjusted based on needs.
  + Determine the need for a GC design team, positions, responsibilities
  + Easy ways to provide feedback, encourage contributions

### Follow up meeting

* DTO will send an invitation for a smaller group discussion around components by the end of September
* DTO will plan to bring the large group back together within the next 3 months to discuss progress and set priorities for the next quarter

### A central place to continue discussions, sharing

* DTO is researching what could be used across GC

## Secondary short-term action items

### Engage technical teams in design development

* Make WET more modular
* IT authorization of modern tools
* Change the way we do sprints

### Tangible metrics of core value proposition

* Definition of evaluation
* Rigour for testing - rating system?
* Experimentation process - draft
* Define rules for changes triggering need for collaboration

### More transparency around decisions

* More and better communications
* Respectful dialogue
* The why

### Documentation

* Inventory existing documentation
* Exercises/work/research to improve IA

# Notes from break-out sessions

# Principles

## Brainstorming session

* Explain the why behind guidance decisions so people understand and so that if the “why” changes, guidance can change too
* Continuous improvement
* Need a change management plan
* Flexibility + consistency - find the right balance
* Outcomes vs Outputs
  + Outcomes: Need to be defined
  + Outputs: Design the dev experience (designers etc.; comms/mktg)
    - Multidisciplinary - good for Programs, Communications and IT specialists
    - Design system becomes a learning tool - like a manual for new practitioners
* “Better Faster”
  + Pace layering - some items change quickly, while others change slowly...depending on impact/need
* Technology agnostic
* Think long-term
* Open work
  + Research and testing etc (how?)
* Experimentation

# Governance

## Next steps

* **\***\*List of positions for core team + responsibilities
  + Evaluate the need for a GC design team
* \*\*Find a champion
  + Who owns design system
  + Who pays for it (CIO, Comms tax, MOUs)
* \*\*Sales: tangible metrics of core value proposition
  + Definition of evaluation
  + Rigour for testing - rating system?
  + Experimentation process - draft
* \*\*Gather info in one place
  + migrate or links to all platforms?
  + Communication between us, within the Canada.ca design system or branching to experimentation & integration to be determined
* \*\*More transparency around decisions
  + More and better communications
  + Respectful dialogue
  + The why
* Establish a governing body for collaboration (grassroots approach)
  + Regular review of governance
  + Survey on feedback process and governance
  + Communicate feedback process to developers
    1. Establish process
* Draft a Responsible, Accountable, Consulted, and Informed (RACI) and consult

\*\*Identified as highest priority

## 

## 

## Brainstorming session

* Not overly regulated
* Strategic and operational
  + Tied to principles/KPIs
* Cultural issues of governance across GC
* How to measure and evaluate?
  + Different for designers and developers vs end users - we’re building for both audiences
* Testing exit criteria to move from experimentation platform to design system (timing/duration)
* Consistency and guidelines
* Collaboration process
  + Open to public
  + Checklist
  + Assessment criteria

## Issues

* Organizational and community management
* How to measure and evaluate
* \*\*Governance for planning ahead - lack of communication on vision - need a vision to address issues - someone to take the lead
* Communication with community
  + Out and in - feedback integration
* What message does it send to departments if there are multiple design systems at TBS and elsewhere?
  + Important to coordinate efforts and message
* \*\*Clarify roles and responsibility for design system vs Canada.ca
  + Other governance
  + Language
  + Tech
  + Design
  + Content
* Challenge function - healthy
* How long does it or will it take to make changes and improvements

\*\* Issues requiring most immediate focus

## Solutions

## Open consultations

## Department as a core team (multidisciplinary includes researchers, content, data, ux, developer, policy, coordinator)

## Dedicated resources

## Small, but mighty

## Community/outreach engagement manager

## Senior management champion

## Transparency of testing level - embrace the fact that it won’t always happen

## Environment: how and where to experiment

## process?

## Accountability of evaluating

## Accepted definition of evaluation

## Policing - labour? Community and/or core team?

## Quality Assurance - readability

## Governance evolves through development/ experimentation process

## Vision : starting with current state

## Revisiting regularly by the community (web; community; grassroots)

## Governing body to coordinate

## Feedback process - coordination can be ad hoc

## Collective knowledge repo (Github)

## IT representation - more alignment

## Departments look to TBS for guidance

## RACI analysis for each area (responsible, accountable, consulted, informed)

## Trust to have a healthy challenge function

## GC RACI and share

## Have departments develop their own to align

## Handle most issues at working level (decision tree for issue triage)

## Working groups for process

## Specialist vs generalist approach

# Technology

## Next Steps

1. Engage tech teams in design dev (cross-functional multidisciplinary teams)
2. Make WET more modular
3. IT authorization of modern tools
4. Change the way we do sprints

## Brainstorming session

* React vs Vue vs…
* Basic web tech (HTML, CSS, js)
* Open source
* jQuery outdated: blocker
* No tech debt
* Version control

## Issues

* \*\*Skills/training
* \*\*Outdated technology
  + Technology gap
* \*\*Technical debt
* Monolithic
* Velocity of change
* Documentation
* Onboarding resources - helping new folks get up to speed

\*\* Issues requiring most immediate focus

## Solutions

* JavaScript framework
* Decouple components
* Consistent project management
* Cross functional team
* Modern tools
* Build for change
* Better change management
* Use experimentation environment as a kernel for a new framework
* Cut down (or focus) designs/components to a more manageable set
* DevOps standards
* Modular patterns

# Resources

## Next Steps

1. \*\*Need focused time for existing DTO staff
   1. Delegate other things/share
   2. Road map to get dedicated resources
2. Research communications platform
3. Develop working group terms of reference

Documentation

* \*\*Inventory existing documentation
* Exercises/work/research to improve IA

Collaboration

1. Define rules for changes triggering involvement
2. Easy way to provide feedback
3. \*Figure out ways to encourage contributions

Tools

1. Identify tools currently used
2. \*\*Research to see what collaboration tools could be used across GC (community engagement and tools to work together)
   1. security / privacy impact assessment

Time

1. Micro - encourage light participation
2. Clearly show how to contribute passively

\*\*Identified as highest priority

## Brainstorming session

* Make ROI / value clearer to EXs
* Maintenance takes time and resources
  + Product
  + Community
* Dependencies - IT
* Dedicated resources required
  + Roles need definitions
* Documentation required

## Issues

1. Central design system team composition
2. \*\*Business case for central management
3. Community involvement
4. Practical connection
5. Documentation - IA, how to use and tech needs
   1. Changes
   2. Keep simple
   3. Collaboration (see below)
6. IT dependencies: what tool can be used
   1. Updating WET versions
   2. Time for GC community to collaborate

Collaborating

* When to collaborate and when not to
* It takes time to build a community
* Who makes decisions?
  + Democratic?
  + Evidence based
  + Product owner
* Managing the community
* Stewardship not compliance
* Common tools
* Examples

## Solutions

## Product owner (EX minus 1)

## Access to senior management

## Multi-disciplinary team

## Executive champion - sufficient authority

## Developers

## Researchers in UX

## Content designers

## Community management

## Communications

## Cycling of roles

## In DTO

## Outside DTO

## Communications platform

## Working group meetings

## Well management

## Clear purpose

## Solution based

## Documentation

## Not too technical

## Research with actual users of the system

## Better integrated

## Major, minor, patch?

## Document changes

## Real working coded examples in context

## Collaboration

## Have a problem - use github issues to collaborate

## Triage in the core team

## No wrong door - no matter how you make contact, it should be possible to reach the right people

## Encourage collaboration

## Tools

## List of pre-approved tools (github, slack)

## Time

## Micro-missions

## Big

## Small

## Collaboration could be added in performance management agreements (make it a priority)

## Training on collaboration tools (screencast)