

# Exchange Lab Partnership Agreement

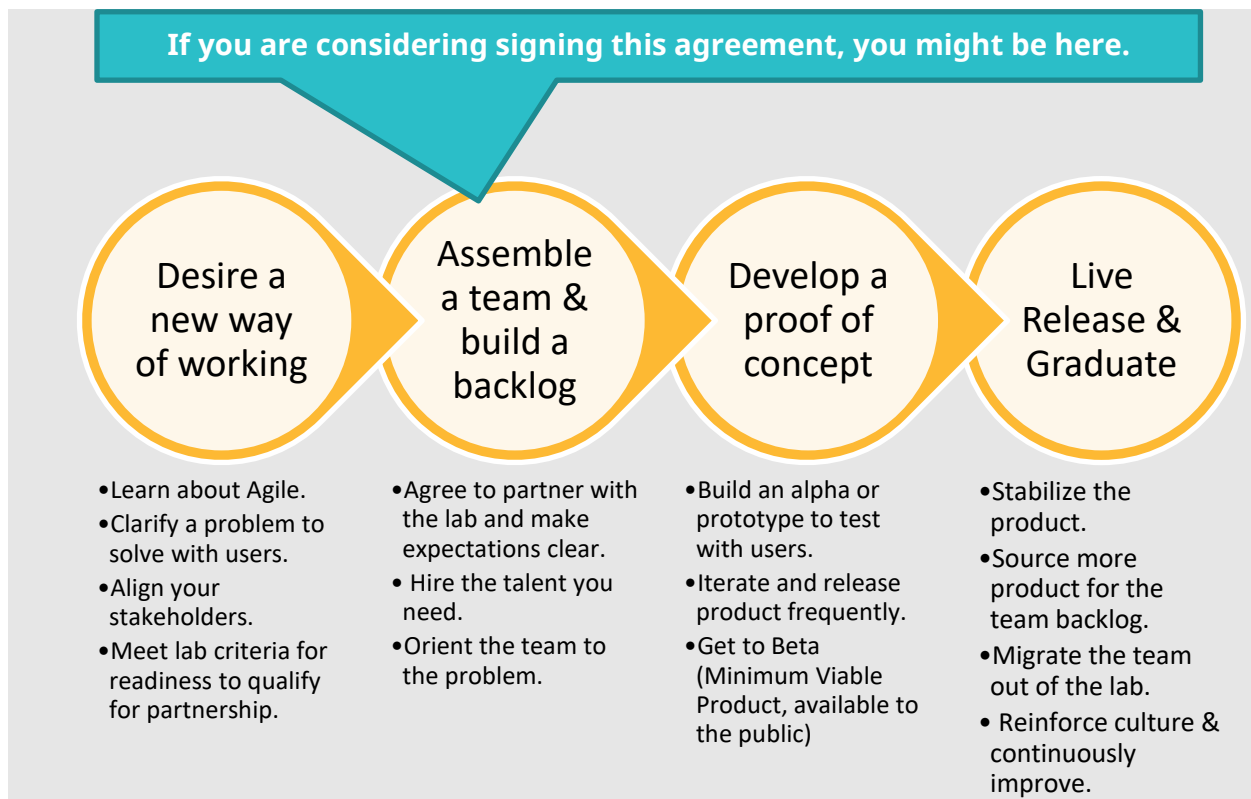
For program areas applying for a residency at the Exchange Lab, this partnership agreement describes **basic requirements for entering the lab and the general expectations for partnership.**

This document does not provide all the details of what a partnership includes. Prior to signing this agreement, you will have been provided clarity on what happens in each phase, so you know what you are signing up for. [Learn more on our Exchange Lab Operations website.](#)

**Ministry:**

**Business Area:**

**Proposed Product:**

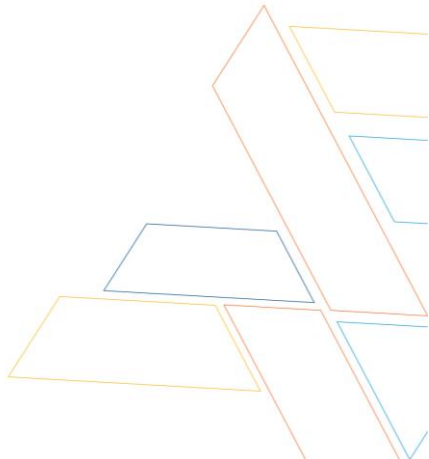


# Contents

- Partners in Continuous Service Improvement ..... 3
- How Product Teams Qualify ..... 4
- Exchange Lab Investment ..... 5
  - What Teams Receive ..... 5
  - Experts in Residence ..... 6
- The Cost of a Team..... 6
- Benchmarks for Success..... 7
  - Leaders learn and support each other ..... 8
  - Trust your People ..... 8
  - Lab Culture and Collaboration ..... 9
  - Standards and Community Code ..... 9
  - Co-Location ..... 10
  - Build Internal Capacity ..... 11
  - Time to Learn ..... 11
  - Default: Working in the Open..... 12
  - Track your Journey..... 12
- Financial and Administrative Tasks ..... 12
- Graduating from the Lab..... 13
- Flexibility of Terms ..... 13
- Pivoting away from the Lab ..... 14



Where ideas work



# Partners in Continuous Service Improvement

Each of the individuals listed below are sponsors and champions of the Delivery Team. Each person will become familiar with this agreement so they can support the Team in this new endeavor.

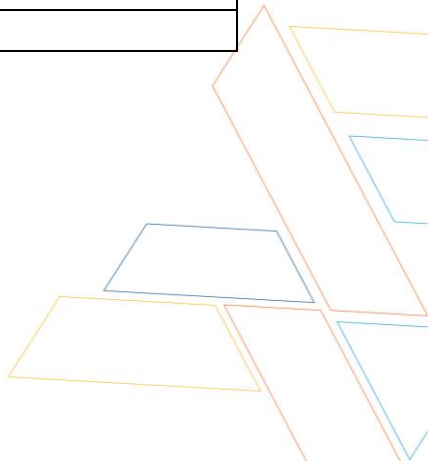
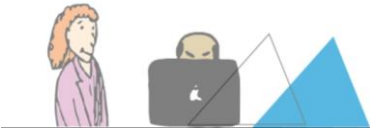
Champions might include subject matter professionals or agencies with aligned mandates who are informing the Product Manager of what to consider prioritizing in the Team’s backlog. We also refer to this group of people as an “Alliance Team.” They are expected to regularly attend sprint reviews.

Partners are to read this entire Agreement, discuss any points of misalignment, and communicate amongst parties their level of clarity and comfort. At that point, the Agreement is to be amended if needed, then dated by the parties listed below when they agree.

	<b>Agreement date</b>
<b>Exchange Lab</b>	
Hayden Lansdell, ADM, Citizen’s Services	
Rumon Carter, Executive Director, Exchange Lab	
Heather Remacle, A/Director of Exchange Lab Operations	
<b>Program Area</b>	
Assistant Deputy Minister:	
Executive Director:	
Product Manager/Owner:	
<b>Other Key Champions - Alliance Team</b>	
Consider partners in service delivery including but not limited to policy development, IM/IT, privacy, and security professionals.	
Chief Financial Officer:	
Ministry Chief Information Officer:	
Others:	



Where ideas work



# How Delivery Teams Qualify

Is your program area ready to invest in the creation of a cross-functional team devoted to solving a high-priority problem, to apply the mindset and methods of Agile product development? Teams that are invited to the Exchange Lab demonstrate a need for acceleration towards this new way of working, **and they are ready for the challenge**. This includes teams from organizations that do not yet have Agile or Continuous Service Improvement capacity or culture, but a desire to work differently, with champions in the right places.

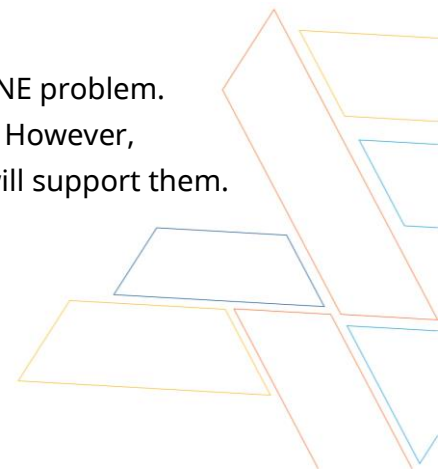
There are also expectations related to the nature of the product, as the Lab is designed to support the development of Agile teams and digital products, or products that advance the delivery of Government's Digital Framework (see [digital.gov.bc.ca](https://digital.gov.bc.ca)).

Prior to coming to the Lab, and signing this agreement, teams must establish the potential product is:

- **Solving a real problem:** Enough service analytics and/or user research has confirmed the users needs requires development of a new product.
- **Priority for the Ministry:** Has funding, requires timely delivery, is connected to mandate, and has the attention of the senior executive.
- **Complex:** Requires focused attention to define the problem and explore and test solutions using Agile methods.
- **Digital:** Requires a digital expression (this may also lead to policy and procedure changes) or advances broader Government digital objectives.
- **Broadly valued:** Includes at least one business capability that serves the needs of other program areas, i.e. the product built can be leveraged by others.
- **Continuous:** Will deliver value into the foreseeable future, such that a program will dedicate a Team to continuously improve the product after it leaves the Lab.

These qualifying conditions are to be confirmed PRIOR to the signing of this partnership agreement.

**Note:** A team is not an “organization” – it is nine people or less solving ONE problem. Residency under this agreement is limited to one team per organization. However, partnership supports extend beyond the team to the organization that will support them.



# Exchange Lab Investment

## What Teams Receive

The Office of the Chief Information Officer funds a team within the Digital Platforms and Data Division that facilitates operations at the Exchange Lab (part of the Design and Delivery Branch). The Exchange Lab team, provisioned with space, tools, and contracts, enables connection across the BC Public Service and beyond to maximize the effectiveness of a team adopting digital capabilities to deliver public impact.

Exchange Lab teams get VIP service:

- Using the Digital Marketplace to procure Agile vendor teams.
- Accessing and using tools and technologies supported by Platform Services, such as DevOps tools.
- Orientation to other innovation disciplines that can support excellent multi-channel and end-to-end service delivery.
- Priority support navigating corporate policies and procedures.
- Ongoing coaching for Agile delivery excellence, including team performance and performance management.

This cost is covered by the OCIO and there is no recovery charge for the services of this team, or the general office provisions (tables, monitors, chairs, stationary) offered at the physical Lab.

The value to the OCIO in running the lab (because you must be wondering!) is insight into what is working for programs across government to optimize delivery with digital capabilities. The Ministry of Citizens services exists to serve all of government in improving the way we deliver service.

This partnership embeds mutual accountability for experimentation, learning, and continuous improvement of specific services to citizens, as well as corporate services and platforms to government agencies.



## Community Connection & Wayfinding

People who are new to the ways of working supported by the Exchange Lab benefit from the high touch service of connecting to the digital delivery network and mentors.

The values that make successful teams include [Curiosity](#), [Service](#), [Passion](#), [Teamwork](#), [Accountability](#) and [Courage](#).

## Experts in Residence

The Exchange Lab is partnered with the OCIO, Government Experience Division (GDX), the Public service Agency, and other Ministries to invest in the success of product teams. Public sector experts (“Experts on Tap”) are available to teams, offering guidance in:

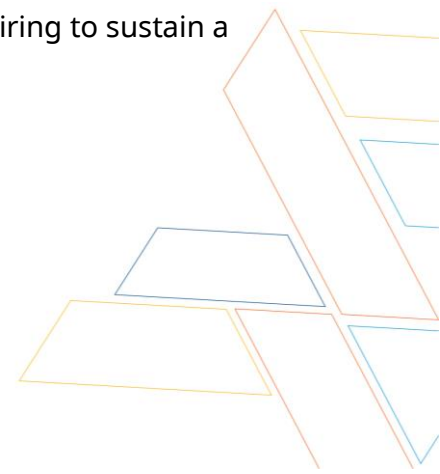
- Service Design
- Innovation Practices
- Privacy & Security
- Behavioural Insights
- Integrated Data & Analytics
- Social Media
- Developer Operations
- BC Stats

## The Cost of a Team

Senior leadership and lab project teams should budget for \$800k-1.3M to pay for the team (this includes staff and contractors, as well as continuous training). \$800K-1.3M is not an IT capital budget number – it means “being able to pay for the team” however those expenses occur (salary, contract fees, training, etc.).

It is common for vendor teams to be procured through “Sprint with Us” and multiple vendors may work on a single team. Some teams also commit early (at start-up) to hiring employee developers and other digital talent.

The ministry must pay for organizational development: org design and hiring to sustain a team. The Lab can support these activities with advice.



While the Exchange Lab pays for physical space at the lab, hosting/platform costs, Lab operations, and some training, Ministries are expected to pay for unique resources, including:

- Any specialty office equipment and supplies, including computer software and hardware, that their product / work requires; and
- Training not offered freely by the Lab.

*Note that as the OCIO establishes application hosting services using modern infrastructure, including public cloud, there may be changes to how these services are provisioned, including costs.*

## Metrics and Return on Investment

As a team gets started, they should be able to illustrate what the value of the work is going to achieve, associated with the problem they are aiming to solve. Metrics of user value, cost savings, process improvements, reuse of existing digital components (offset costs), and reduced time to delivery of service results are valued proofs of **good investment**.

The Lab does not prescribe what the metrics should be, given the uniqueness of each team. However, Lab Operations will support the team with practices, approaches and exemplars to learn from.

Sponsors should be able to communicate the service improvements and operational efficiencies gained by the team to secure ongoing funding and sustainment. This requires that the team measures and reports on their progress.

It is the responsibility of the program area to ensure value delivery to build trust with senior executive and funding agencies. This will meet the Lab's expectations for teams to sustain and continuously improve a product, while building modern delivery capacity in the BC Public service.

## Benchmarks for Success

We have found that shared benchmarks set the stage for mutual success.

The Exchange Lab is committed to working with each team to create a partnership that leads to a high performing Continuous Service Improvement team, a solid deliverable for the business area, and a framework for using new tools and approaches.



These benchmarks create realistic expectations, and most importantly, they set Lab teams up to be successful. Experience has shown that to be most successful there must be a combined partnership between the Lab, ministry Information Management Branches (IMBs), Ministry Executive and the program area.

## Leaders learn and support each other

Senior leadership (DM, ADM, EDs, Directors) will support the team working in a new way. Lab teams:

- use Agile methods,
- work in the open,
- use open source code and tools, and
- are willing, able, generous collaborators.

This new way of working requires that leaders support their people in ways that are typically unfamiliar to most Ministries.

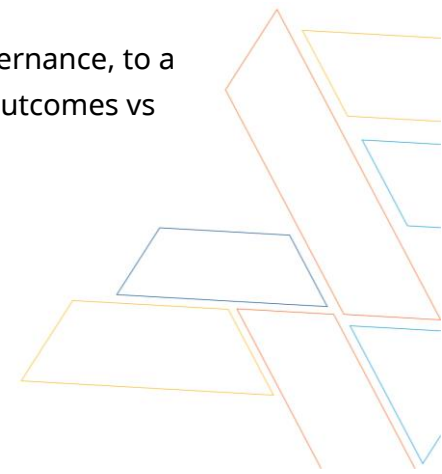
As part of the change management necessary to support this corporate initiative:

- a. All leadership partners and champions will accept training offered by the Exchange Lab (between 3 hours and 2 days, depending on role) to support this accountability.
- b. ADMs will act as project champions and sponsors – including socializing the work done at the Lab within their Ministry;
- c. An “Alliance Team” of committed, innovative partners made up of members of the business area (ED/D), as well as the CIO, work together to ensure success.

## Trust your People

Senior leaders that create the conditions for teams to have autonomy and alignment with organizational goals will enable high performing teams in this complex environment. Autonomy requires that traditional approval structures are evaluated for their ability to do the same and are adjusted as necessary.

This means moving from a “command and control” (output focused) governance, to a “trust based” (outcome focused) governance, where we are focused on outcomes vs output.





Additionally, leaders must empower team members, in particular, Product Owners, especially around funding and approvals.

Why? Once the vision and outcome expectations have been set among the Delivery Team, Alliance Team and Executive, the Product Manager should be able to decide, based on user feedback, how to execute that vision, including respecting project funding, without incurring the time delay of seeking approvals. Teams produce on a two to three-week sprint schedule so delays to funding are delays to producing a working product.

This quick cycle of releasing value is beneficial to managing risk given smaller increments. Where products fail to meet expectations, teams are trusted to quickly adjust.

## Lab Culture and Collaboration

As part of their journey at the lab, teams “pay it forward” to new teams and provide mentorship, learning events, and advice as they reach maturity. While contracted team members are expected to produce code and product, they are also expected to help us build capabilities for a digital government more broadly.

Openness and sharing of success and failures are critical to building capacity across the BC Public Service. Through collaborating with the community, we can form cross-functional, exemplar product teams that can bring their experiences and knowledge back to their home organizations.

Experienced internal government team members, on occasion, will be asked to provide up to one full day of Agile training workshops, organized by the Exchange Lab Operations team.

## Standards and Community Code

As government continues to improve its approach to custom software development, teams will be immersed in the learning and building that results from an active and collaborative community. The Exchange community constantly improves the support and guidance for custom code development in government. While the Lab Operations and Platform Services team lead this venture, everyone using these shared resources is encouraged to pitch in.

Some specific platforms for developing standards and code:



Where ideas work



**Rocket.chat** - [This chat application](#) hosts Agile delivery teams working on the DevOps hosting platform through Openshift. It includes external vendors who are authorized through Github, and it serves as a key function for wayfinding and troubleshooting new technology. Every team is expected to participate in the Rocket.Chat community so as to optimize contribution to community learning.

**DevHub** - [This website application](#) is maintained by the Platform Services team to provide documentation and orientation on the tools and processes that enable DevOps. The DevHub will serve as the primary source of guidance for the community on matters that have been standardized, such as the API guidelines. Every team is expected to use the DevHub ([developer.gov.bc.ca](http://developer.gov.bc.ca)) to efficiently kick-start and to contribute feedback and resources as they discover improvements.

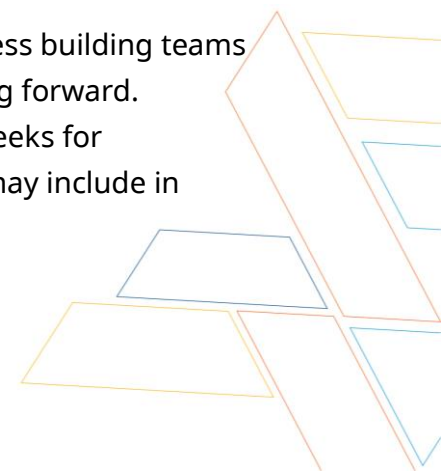
**GitHub** - The Exchange Lab prioritizes working in the open. This includes producing code within the [BCGov's Github repository](#) so that the organization can learn from itself and collaborate. Teams are expected to model best practices in code management and documentation to reach these aims.

**Common Components Library** - Program areas across government are often solving problems that rely on business capabilities that are common. These might be platforms, licences, or custom-built functions, such as authorization or notification. The Exchange Lab team works with the OCIO to define what a good component looks like, and will be publishing common components in a library on [Digital.gov.bc.ca](http://Digital.gov.bc.ca). Teams that are building new, or improving existing custom code components that others might use are expected to build with reusability in mind. Where possible and corporately supported, the Exchange Lab will work with a team to publish suitable contributions to this library.

## Co-Location - Virtual and Physical

Co-location has been a key tenet of team formation and function at the Exchange Lab since its inception. It takes a significant amount of facilitation and psychological safety to form teams quickly, while asking them to use entirely new methods and tools in their work.

The Exchange Lab team, throughout COVID-19, has had significant success building teams remotely. From this learning, comes an opportunity to do the same going forward. However, it is still recommended that teams prioritize the first several weeks for engagement with the Exchange Lab and surrounding community. This may include in person engagement at the physical lab, when possible.



Starting in June 2021, a new location for the lab – 2<sup>nd</sup> floor 808 Douglas – will be provisioned for teams seeking the coaching, facilitation, event management and training services offered by the Exchange Lab. There will also be team work-point allocations for those in the first phase of their development.

## Build Internal Capacity

The Exchange Lab’s mission is to build capacity in the public service for digital capabilities that lead to more public impact. Unlike traditional “Waterfall IT” projects, Exchange Lab teams are an integrated unit that produce results continuously with the business area. Teams are expected to be kept together after final releases and graduation from the Lab. The commitment to a team results in fostering this new way of working across their home organization.

Since 2016, new organization model designs and supporting job profiles have been developed to enable this new way of working. The Exchange Lab works with the PSA and the broader community of Agile hiring managers to develop best practices and guidance on these models.

At startup, every potential lab team be planning to have a minimum of two or more team members who are government employees from the business area and/or ministry Information Management Branch (or equivalent). In particular, the business area will need to supply:

- A **Product Owner** that has been trained in Agile methods. This role is typically at the Band 3 Director level, given the complexity of services the Lab tends to support.
- A **Senior DevOps Specialist**, or Site Reliability Engineer (SRE), to be onboarded before going live. This role is critical for ensuring the sustainability of a product, including ongoing security improvements, maintenance, and feature improvements if called for.

## Time to Learn

Each lab team and their senior leadership team should have the expectation of a period of learning and development, before expecting demonstrable results or a working product.

During this time, lab team members work exclusively in the lab and need to feel supported and released from their day to day duties to focus on the project.



The new approach for working at the lab takes time to learn and master. The Agile methodology challenges existing concepts for delivery and to be realistic and supportive of this knowledge leap, teams need the freedom to start small so they can eventually build better, faster and with higher quality.

## Default: Working in the Open

Teams are expected to build products in the open, using open source code. Where possible, data sets are also expected to be open.

Potential Lab projects should not involve very sensitive privacy and security requirements or needs.

There is flexibility here, but if privacy overrides the open nature of working at the Exchange Lab then research, discussion and a plan for alignment will be necessary to establish a compromise that works for all the parties involved.

The goal here is to create the right conditions for early adopters of Exchange Lab methods to be successful, so we can learn how to do this in government, and special privacy requirements may challenge this goal.

## Track your Journey

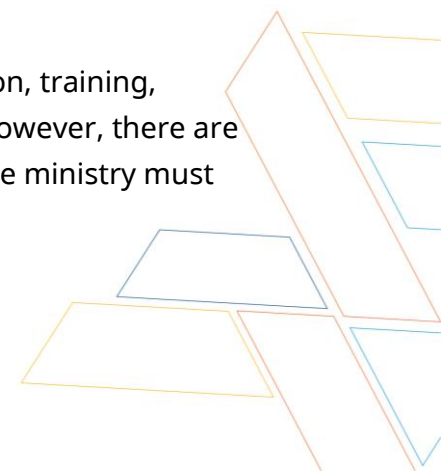
Potential Lab teams will participate in (minimal) information gathering/reporting towards cross government capacity.

As part of using technology as an enabler and working in the open, it's important to share any new products/services created in an aggregated way, for use by future teams and/or other ministries. Being in the Lab means being part of a community and sharing our findings leads transformation across government.

It is also critical to share the journey with the rest of the home organization that will support the team to be sustained after the Lab.

## Financial and Administrative Tasks

The Exchange Lab will support your team with regards to physical location, training, mentorship, coaching and the OpenShift platform during partnership. However, there are some financial and administrative functions that the product teams home ministry must maintain responsibility over.



Below is a list (not limited to) of some common functions that should be planned for.

- Contract management – this includes all required forms and approvals and administration
- Payment of contracted resources
- Administrative functions including iStore requests, government on-boarding requirements
- Privacy Impact Assessments (PIA) and Security Threat Risk Assessment (STRA) for your program/product
- Software licences or subscriptions
- Team HR needs

## Graduating from the Lab

By the time the team has produced their final “live” release, there must be a plan in place to re-integrate that team back to their home ministry. We call this “Graduation” and it should happen **within six months**.

The investment in a high performing team is significant and they are your greatest asset. Our ideal situation is that this high performing team stays together. They could continue to address feature requests and maintenance needs continuously while taking on new products as part of a portfolio in the home agency.

Not all organizations will take the same approach to this, especially as vendors typically are part of the team at the start of the journey. It is wise to consider how a team might shift over time to be operational, while not disrupting performance too much.

While Graduation might signal a severing of the team from the focused support of the Exchange Lab team (to enable new teams to onboard), it is not the end of the relationship. All Exchange Lab alumni, and teams that have formed outside of the lab, are connected through a Digital Delivery Network across government, which is facilitated by the Exchange Lab and other corporate service improvement partners in CITZ.

## Flexibility of Terms

The expectations outlined in this agreement are the results of lessons learned from previous residencies, as well as the desired outcomes for advancing digital government the OCIO is seeking to achieve.



While partners are expected to meet these expectations, it is understood that we operate in a complex environment.

Should any party to this agreement be challenged to meet these expectations, a timely conversation will be held with the following individuals:

- ADM
- Executive Director
- Product Owner
- Exchange Lab Leadership
- Champions
- Partners

## Unique Conditions for this Team

*Please convey any conditions or concerns regarding this team or the product they are delivering that might require special consideration to enable the terms of this partnership.*

- *Example: This product handles sensitive or private information, and extra care will be taken regarding working in the open, including publishing code in GitHub.*

## Pivoting away from the Lab

If any party should be unable to meet the expectations outlined in this document (or some custom or version of it), a decision will be made to pivot a team away from the Lab Partnership. This means that the Exchange Lab team will no longer prioritize services to the program area, and share in responsibility for their success.

The Lab is a sensitive habitat for people learning to work in a new way and is a significant investment by the OCIO. The Leadership of the Exchange Lab will have the ultimate say in pivoting teams away from the Lab.

Every reasonable effort will be made to support the people involved in making this transition, should it be required.

