

SAMPLE EXCERPT · SELF-SERVE PRACTITIONER TOOLKIT

The Relational Service Self-Assessment Worksheet

Score one online service across the 4 Pillars of Relational Governance (20 statements · 0–2 scale) and turn your lowest-scoring gaps into a 90-day improvement plan.

Who this is for

Service designers, UX and content designers, caseworkers and frontline teams, advice organisations, and nonprofit or civic service teams who want a structured conversation about how their online service relates to the people who use it.

Use it on a service you design, run or advise on. It is a reflection aid for your own team, not an external audit.

How to use this worksheet (solo or with your team · 60–90 minutes)

1. Pick one specific journey. Don't score a whole organisation in the abstract. Choose one concrete journey, for example applying for a hardship grant, booking a first appointment with an advice service, or reporting a change in someone's circumstances.

2. Score each statement honestly (0, 1 or 2).

0 = **Not true yet** (transactional or absent) · 1 = **Partly true** (inconsistent, or depends on who handles the case) · 2 = **Clearly true and verified in practice.**

3. Look for evidence, not intentions. Walk through the journey as a user would, check real messages and screens, and ask the people who handle cases. Note what you saw next to each score.

4. Grounded in research and open standards. The statements draw on Herd & Moynihan's work on administrative burden (learning, compliance and psychological costs), plain-language guidance (ISO 24495-1), the once-only principle, and accessibility standards (WCAG 2.2 AA / EN 301 549).

Pillar 1 sample (statements 1–5 of 20) · Reaching Out

#	DIAGNOSTIC STATEMENT & BASIS	EVIDENCE TO LOOK FOR IN YOUR SERVICE	SCORE (0 / 1 / 2)
1.1	Reaching people at the right moment Reduces learning costs (Herd & Moynihan)	People find out they can get help, or need to act, before they miss a deadline or run into a problem.	[0][1][2]
1.2	Start from the person's need, not internal jargon Plain-language orientation (ISO 24495-1)	The first screen says in plain language who the service is for, what people need to have ready, and how long it takes.	[0][1][2]
1.3	Don't ask twice Once-only principle / reducing compliance burden	Information people have already given is reused (with their consent) instead of being asked for again.	[0][1][2]
1.4	No dead ends Referral and signposting	If this service isn't the right fit, the screen points people to a suitable alternative or to a person who can advise them.	[0][1][2]
1.5	Channel parity and assisted digital Digital inclusion (WCAG 2.2 AA / EN 301 549)	Someone who gets stuck online can switch to phone, in-person or assisted support without losing what they already entered.	[0][1][2]

Pillar 1 subtotal: ____ / 10 **Notes and evidence:**

Overview of Pillars 2, 3 & 4 in the full 20-statement worksheet

PILLAR	CORE DIAGNOSTIC FOCUS (5 STATEMENTS PER PILLAR · 10 POINTS MAX PER PILLAR)
Pillar 2: Mutual Thriving (Statements 2.1–2.5)	Free-text context alongside structured fields; clear two-way status with named stages; pause and resume without losing data; in-journey feedback that the team reviews; explaining how people's input shaped the outcome.
Pillar 3: Compassionate Efficiency (Statements 3.1–3.5)	Good faith by default with proportionate checks; honest mistakes can be corrected without penalty; reaching out before closing an incomplete request; automation that saves people effort rather than shifting work onto them; plain-language outcome messages with a clear way to ask for a review.
Pillar 4: Technology that Weaves (Statements 4.1–4.5)	Rules and automated steps explained in plain language; a warm handoff to a person who can see the context; staff able to handle edge cases the system doesn't fit; assistive-technology compatibility; no dark patterns or pressured consent.

One-page team action plan template (excerpt)

PRIORITY GAP (LOWEST-SCORING STATEMENT)	CONCRETE CHANGE IN THE USER JOURNEY (NEXT 30–90 DAYS)	OWNER & CHECK-BACK DATE
1.		
2.		
3.		

Improving Online Public Services (improvingonlinepublicservices.org) · Operated by Humanity Solutions · KvK 71110178 · BTW NL002466080B20 · Hamerstraat 67D, 2512 CX The Hague, Netherlands · connectwithus@humanitysolutions.net.

This sample is a free preview of the 20-statement Relational Service Self-Assessment (€49.00 incl. 21% VAT / €40.50 excl. VAT). It is a reflection and design aid, not a legal audit or certification.