Key outcomes

Title:	Out-of-session Strategic Working Group meeting
Issue date:	8 October 2021
Venue:	Webex
Event date:	29 September 2021 Start: 1:30pm Finish: 3:30pm

Chair:	Mark Stockwell Simon Foster	Facilitator:	Mark Stockwell
Contact	Sonia Lark	Contact phone:	02 47257460

Attendees: names/section	**ATO:** Mark Stockwell – AC, Digital Partnerships, Planning & Governance Michael Ferris – Director, Digital Wholesale Integration Services Kylie Johnston – Director, Digital Partnership Office Sonia Lark - Director, Digital Partnership Office Kelly Norwood – Director, Small Business Experience Emma-Grace Pinner – Director, Digital Wholesale Integration Services Sangitha Sivayogaraj – Director, Digital Wholesale Integration Services Terry Seiver – Digital Partnership Office **Industry:** Simon Foster - Co-chair- DSPANZ Mike Behling – MYOB Helena Bone - MessagXchange Max Ciereszko - FastTrack Mike Denniss – Class Limited Simone Dixon – Elmo Software Simeon Duncan - Intuit Trajan Goldsworthy - eTax Joy Hooper – Oracle Corporation Australia

	Allen Knight - TaxLab Matthew Prouse - Xero Shaun Wilkinson – Arrow Research
Apologies: name/section	Maria Daglis – Director, Indirect Tax Ian Gibson – DSPANZ Michael Wright – Access Group Danna Zheng – CCH Collaborative Solutions

Next meeting	**27 October 2021**

Agenda item: 1 – Welcome and introduction

Mark Stockwell welcomed the group and thanked everyone for attending this out-of-session meeting.

Alan Knight (CEO of TaxLab) was introduced as a new member, replacing Mike Roberts.

The group was reminded that some discussions held in these meetings can be sensitive and their commitment is appreciated to ensure the information shared aligns to the details provided in the meeting outcomes.

Simon Foster advised New Zealand IRD has set up an equivalent group, looking to repeat the experience and success of the Strategic Working Group.

Agenda item: 2 – ReST APIs for the Digital Services Gateway Emma-Grace Pinner

The Digital Services Gateway (DSG) will join the retail and wholesale capabilities and will allow simultaneous delivery of APIs, providing taxpayers with a consistent experience regardless of channel.

The process to release an API will be highly collaborative and iterative.

DSPs will be engaged at multiple stages in the delivery timeline - *see presentation pack for further details.*

The DSG is not intended to be a replacement channel for SBR or BDE, but will form a lightweight capability initially that will be built up over time.

The DSG is intended to:
- Increase speed & efficiency through automation & self-service
- Facilitate growth through improved customer experience
- Spark innovation & establish a development community with the ATO
- Reduce costs to consumers, increase ATO delivery capacity
- Make tax just happen

The group agreed that the Operational Security Framework (OSF) requirements need to be considered when describing the ease of development of APIs on the DSG, especially for those DSPs not currently building in SBR.

The developer portal will house all the specifications and resources that developers require to design and build APIs, most of which will use JSON format. The Apigee edge product will also have an analytics capability available for DSP consumption.

A demonstration of the developer portal will be presented at the next meeting on 27 October.

Agenda item: 3 – DSP Roadmaps	Kylie Johnston

The development of a view of future work initiatives is something that has been asked for for some time now.

We have developed a roadmap and would like feedback from members to understand whether it is 'pitched' at the right level.

There was discussion on the following aspects of the roadmap:

- The level of effort required is difficult to estimate as initiatives on the future roadmap are often still in the early concept stage.
- An indicator to show whether an initiative is driven by legislation or requires legislative change would be beneficial.
- Linking the consultation group listed in the table to corresponding content in the Collaboration hub or on the Software Developers website would be useful.
- Any initiatives which move onto the DWIS delivery roadmap, may move off the future work roadmap.
- Showing alignment to ATO strategic initiatives is valuable and should link to further information about the initiative including who or area of ownership.
- Initiatives would be presented to the Strategic Working Group before being included on the DSP roadmap.

The intent is for the three roadmap views (future work, Delivery and Release on a Page) to be complementary, but not overlapping. They will be published in the Collaboration Hub in Online Services for DSPs and updated on a regular basis.

Agenda item: 4 – Change management process	Terry Seiver

The concept of a change management process was introduced at the last Strategic Working Group meeting. In unpacking the concept further we have come up with a problem statement:

In order to implement material changes, DSPs require sufficient lead times and clear communication from the ATO.

See presentation pack for details of the ATO change frameworks which are currently in place.

Proposed change management principles:
1. Where possible, ATO will communicate lead times proportioned to the scale of change
2. Change will be communicated in the most relevant channel(s) e.g. DSP newsletter, website, Online Services for DSPs, engagement groups, email or direct call
3. Material changes will be documented, with key updates readily identified
4. Natural change processes will be leveraged.

Feedback and discussion from the group included:
- Notification of the removal of services should be broader than the Service Registry
- The current ATO version strategy document should be updated to indicate that only current versions of a service are supported, where a change involves a backend ATO mainframe changes
- Versioning strategy is to be developed for the DSG. DSPs suggested that forcing DSPs to be on the latest version may not be a bad thing
- Lead times currently quoted are for SBR services and are yet to be determined for DSG hosted services
- More granularity required, specific examples called out, for example minor or major changes to services
- It must be apparent that the quoted lead times are not legally binding and are published for high level guidance only
- Where a leadtime for a new or updated service is vastly different from the high level guidance, the change should be escalated to a DSP consultative group for further consideration

Agenda item: 5 - Working with DSPs to achieve Strategic Initiatives Kelly Norwood

The 'Improve Small Business Tax Performance' strategic initiative aims to significantly improve the tax performance of small businesses by integrating tax reporting mechanisms and making verifiable data easier for them to provide, access and use.

There are three core focus areas for this strategic initiative:
1. Establishing meaningful relationships with the right external partners
2. Re-imagining the experience of how small businesses meet their obligations and
3. Implementing solutions that deliver transformation.

Under our 'Internal recommendation 3', we are aiming to **work better together to drive consistent experiences through digital services whether ATO or external services**. We want to invest in early engagement.

See [presentation pack](#) for a list of identified pain points described at the last session.

Guiding principles for creation of a consistent approach in working with DSPs:
- Our plans, priorities and forward work program will be visible to DSPs

- Our decisions to invest in digital services will be informed by evidence and research and the rationale articulated to DSPs
- We will collaborate early with DSPs to explore opportunities before designing potential solutions
- We will consult and/or co-design on products and services with DSPs to improve the client experience
- Working with DSPs enables them to develop value added tax and super software services
- Our digital services will be able to be embedded in the day to day natural systems of our clients.

There are caveats, however, as sometimes we have government agendas we can't control, but we would still aim to engage as early as possible.

The intent is to embed these principles in the Portfolio ans Management Value Office (PVMO) process to ensure project leads are linking in consistently earlier with the DPO.

'Internal recommendation 3' was very well received by the group, especially the view to publish and set up some corporate governance through the PVMO. The DSPs agreed with the communication and engagement approach, to incorporate their voice to help articulate the value of early engagement to support internal cultural shifts to align with the strategy's principles.

The DSPs shared their best example of when early engagement has yielded mutually beneficial outcomes - the resounding response being **JobKeeper**, showcasing an excellent example how we can coordinate with DSPs to look at a problem and ideate together. JobKeeper demonstrates collaboration from an end to end perspective; not starting partway at solution design and/or design adoption.

When asked to consider the following: *If the ATO was to engage you to problem solve and ideate earlier than solution design, this would mean that sometimes you would be investing effort however funding, prioritisation and other factors could result in no actual follow through to implementing a solution. What is your appetite to be engaged this early, noting it will not always yield delivery results?*

The group agreed that they want to be engaged very early and understand/accept that sometimes there will not be any delivery.

It was also agreed that the ATO needed to call out those aspects which would be 'immovable' in a process so they could be considered up front.

Agenda item: 6 – Wrap up & close

The next meeting will include the DSPANZ Board and is scheduled for 27 October 2021.