

the engine room
MATCHBOX
2014-2015 pilot report



the engine room



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The Matchbox Pilot Program was entirely funded
by the HEWLETT FOUNDATION, <http://www.hewlett.org>

Written by the engine room team.

Graphic design by Federico Pinci.

More about Matchbox at <https://thematchbox.io>

We aim at accelerating positive social change by supporting social
change initiatives to effectively use technology and data in their work.

More about the engine room at <https://www.theengineroom.org>

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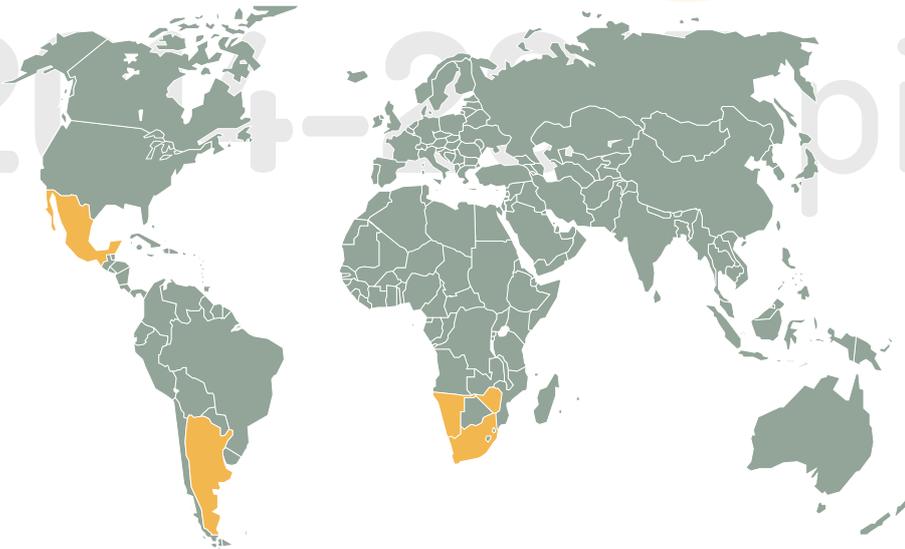
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First published by the engine room in May 2016.

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the engine room MATCHBOX 2014-2015 pilot



MATCHBOX PILOT PARTNERS



INTRODUCTION

The engine room launched the **Matchbox Pilot Program** to test and systematize a core part of our approach: providing demand-driven data and technology support for social change initiatives around the world. The motivation for this approach is based on a fairly obvious premise: every initiative is different and no guide can replace tailored technology and data support. The skills required to design and manage a project with heavy technology and data components are diverse and hard to find, especially if you don't know what you need. It is our theory of change that if the right projects in the right context are fully backed with responsive support geared towards self-sustainability, we can generate real-world impact.

The Matchbox Pilot Program was launched in 2014 and focused on transparency and accountability initiatives in Latin America and Southern Africa. As we recently wrapped up the initial 18-month phase, this report will take a look at what was accomplished during the pilot period, what the supported projects looked like, and how the Matchbox partnerships developed.

MATCHBOX AT A GLANCE

During the pilot, we selected six partner organizations for Matchbox support after a process of open applications, interviews, and scoring along a set of criteria. Two organizations were from Latin America and four were from Southern Africa. Our selection criteria scored for variables such as the strength of the project idea, experience of the project focal point, capacity to effectively integrate technology into core work, a 'fit' between our teams, and many more. We will be refining and sharing our partnership criteria as we further develop it in the coming year based on our experiences in the pilot.

Matchbox Partners in Latin America	Matchbox Partners in Southern Africa
¿Quién Compró?, Mexico	Institute for Public Policy Research, Namibia
Fundación Directorio Legislativo, Argentina	Ndifuna Ukwazi, South Africa
	Research and Advocacy Unit, Zimbabwe
	Kubatana, Zimbabwe

Each of our regional streams had a Lead responsible for establishing and managing the partnerships, and a group of external experts who provided support on issues ranging from data collection, structuring, and visualization, through web development and design, to more strategic contributions.

Matchbox Experts (Organizations)	Matchbox Experts (Individuals)
Code for South Africa–Web development	Julie Lorch–UX design
Fair-play Alliance–Strategy	Don Hubert–Data modelling and sector specific expertise
FrontlineSMS–Mobile	Friedrich Lindenberg–Data modelling
Open Data Kosovo–Web development	Anders Pedersen–Data modelling
Women Hack for Non Profits–Web development	Toby Marsden–Database development
	Gertrude Nicole Friedman–Data digitization
	Juan Manuel Casanueva–Community strategy
	Dimitri Stamatis–Graphic design

KEY TAKEAWAYS

When we designed and launched this pilot, we were exploring answers to several questions related to the use of technology in advocacy. What types of partnerships would be best suited to in-depth, full-project support for using data and technology in accountability advocacy? Could we develop selection criteria that would increase the likelihood of collaborating with the right partners? What types of support providers would be best suited to provide pro bono support to partner projects, and what types of support providers were better suited to be contracted as paid consultants? And while we're still in the process of answering some of these questions, through the process of this pilot we have had the opportunity to explore many of them and have collected insights and documentation along the way.

Overall, we've seen our partners become enabled to **better articulate their technology** and data ideas, adjust their in-house resource commitments to design and technology in strategic ways, connect at local and regional levels with partners who they are able to engage with directly, **think more strategically** about the role that technology and data can play in their future projects; and, ultimately, **dramatically improve their plans for using data and tech** in ways that strengthen rather than distract from their past successful strategies.

In most of the pilot projects we found **security** (physical, digital, and psychosocial) to be an unexpectedly important component. We knew that security expertise and support would be necessary for meaningful transparency and accountability efforts, but the scale and complexity of the issue was challenging. We identified three types of support that we would like to be better at systematizing: 1) responsible data support for initiatives collecting and sharing data that has the potential to cause harm; 2) matchmaking at early phases of a partnership with security trainers who are mandated and funded to provide support to frontline groups; 3) and streamlined support for migrating online platforms into safer operating environments.

In all projects, we found ourselves **needing sectoral support** which took more networking and learning than expected, but proved incredibly useful.

In several partnerships, as was to be expected, we had to work very hard to to keep our eye on the longer term goals of a project when we were leading and managing several technical outputs, and focusing on developing the strategic capacity of funders to do the same. Furthermore, it was much easier to find **pro bono support** than we expected for all but a few types of work: web development and a few types of highly skilled volunteers like wireframing, design, and data modeling.

And finally, we believe we **underestimated the time it would take to see positive impact** within partners' advocacy targets. Despite our hopes, our 3-9 month engagements did not (and are unlikely to ever) allow us enough time to observe partners' projects to make a difference in the world. However, this period of time was sufficiently long to make a difference in our partners' skills and capacity.

TAKING A CLOSER LOOK

So what exactly do Matchbox projects look like? Who are the partner organizations behind them, and what issues do they seek to address? What type of support does the Matchbox team provide? Let's take a closer look.

MONITORING MPS' BEHAVIOR WITH CITIZEN- GENERATED DATA

Partner: Research and Advocacy Unit (RAU)

Country: Zimbabwe

Matchbox support: SMS data collection, structuring, and management
Project design
Digital security

Issues: Legislative transparency

Matchbox experts: Lesedi Bewlay, Southern Africa Regional Lead
FrontlineSMS

- <http://www.researchandadvocacyunit.org/>
- <https://www.theengineerroom.org/harnessing-tech-to-monitor-mps-attendance-and-engagement-in-zimbabwe/>

Research and Advocacy Unit (RAU) is a Zimbabwe think-tank that focuses on human rights, democracy and governance. They conduct research and advocacy in areas where there is little reliable information. MPs' behavior is one of them.

RAU sought Matchbox support to collect information on how well MPs are governing their constituencies, and how they are participating in parliamentary sessions. More concretely, the organization wanted to capture the attendance of MPs through direct engagement with citizens, document this data and share it with the general public via a website. Their idea was to use figures outlining abysmal attendance in sessions, and supplement that information with citizen-generated data about MP engagement in home constituencies. To first test out the entire process, RAU decided to begin in only a few regions where their groups of volunteers were based. Their ultimate goal was to expand to a national scale.

THE MATCHBOX PARTNERSHIP

During the five-month partnership, Matchbox helped RAU set up an efficient SMS messaging system that citizens and volunteers can use to report on their MPs. FrontlineSMS provided the tool for two-way SMS communication, assistance in the setup of the platform, and the know-how for the project team.

Our team worked directly with RAU on the creation of the surveys, the process of finetuning and narrowing their questions into micro-surveys that were easier to answer and analyze. We supported RAU to structure the information, and helped develop profiles of MPs as a base for a relational database that could be populated over time. Both datasets were structured and made available on RAU's **website**, and RAU also included an option for the public to submit information about their MPs through a crowdsourcing tool.

WHERE ARE THEY NOW?

RAU has continued to work on implementation and data collection. The organization is currently conducting surveys with a growing number of volunteers as part of its efforts to improve the collection of information on parliamentary activity.

INCREASING ACCOUNTABILITY THROUGH DIGITIZING POLITICIANS' EXPENSES

Partner: ¿Quién Compró?

Country: Mexico

Matchbox support: Digitization of MPs' receipts
Web development and design
Analyzing microtasking platforms
Strategy for outreach and community building

Issues: Politicians' expenses
Legislative transparency

Matchbox experts: Ela Stapley, Latin American Regional Lead
Tin Geber, Design and Technology Lead
Open Data Kosovo
Juan Manuel Casanueva
Julie Lorch
Gertrude Nicole Friedman
Dimitri Stamatis

- <http://www.quiencompro.org/>
- <https://www.theengineeroom.org/what-were-learning-about-digitizing-and-preserving-documents>
- www.theengineeroom.org/behind-the-scenes-how-we-helped-kick-start-a-microtasking-site/

A group of Mexican investigative journalists came together during an open data hackathon in Mexico to tackle one of the most significant problems facing the country: public sector corruption. They wanted to take a closer look at how members of congress were spending public funds, through liberating, digitizing and visualizing the receipts of Mexican parliamentarians' expenditures.

The ¿Quién Compró? project started with individual freedom of information requests for the receipts of Mexican congressmen and women. The group of journalists behind the project participated in the 2014 version of the Desarrollando America Latina (DAL) civic tech challenge, and won the Sheldon prize, which ultimately matched them with our team. At this point, the team had successfully retrieved thousands of receipts and they wanted to take it a step further by transforming those receipts into machine-readable data.

THE MATCHBOX PARTNERSHIP

The engine room supported ¿Quién Compró? with recommendations on data structure, data entry and the digitization of receipts. We will also worked with them to configure and optimise their server to allow for more efficient data collection.

The first step in the long process was to digitize the receipts by scanning them. This proved a difficult manual task, overwhelmed by the quantity of the "vans full of paper". After a few conversations with the teams behind various microtasking platforms and analysing the code from these platforms, we decided to build our tool by combining existing open source components from Crowdata (developed by the data journalism team at the Argentine newspaper La Nacion) and some of our own original code. In parallel, the experts at Open Data Kosovo developed and designed the web platform.

And while the process is still ongoing (¿Quién Compró? team members work on this project in their free time as volunteers), once these thousands of paper documents are transformed into machine readable data, ¿Quién Compró? can use a microtasking platform to engage hundreds (or thousands) of people to help identify how government officials are actually spending public funds.

WHERE ARE THEY NOW?

After one year of working together on the ¿Quién Compró? project, there still is much work to be done. While the team has already begun the community outreach process to advertise the tool and recruit people interested in the crowdsourcing component of the tool, they are still in the process of digitizing the receipts, which has proved more time consuming than previously anticipated. Once finished, the team looks forward to working with the data to begin their in-depth investigations and analysis.



IMPROVING PUBLIC SERVICE DELIVERY AND MUNICIPAL COMPLIANCE WITH ACCESS TO INFORMATION LAWS

Partner: Ndifuna Ukwazi (NU)

Country: South Africa

Matchbox support: Data structuring / visualization / management
Web development and design
Strategic support

Issues: Procurement transparency
Public service delivery

Matchbox experts: Lesedi Bewlay, Southern Africa Regional Lead
Code for South Africa
Julie Lorch

- <http://nu.org.za/>
- <http://muni.compliancetracker.org.za/>
- <https://www.theengineerroom.org/localizing-transparency-tracking-compliance-with-freedom-of-information-laws-in-south-african-municipalities/>

Ndifuna Ukwazi (NU) is a team of advocates based in Cape Town, South Africa. They use research and strategic litigation to campaign for justice and equality in poor and working class communities. They also aim to support the development of social movements in South Africa by supporting new organisations, mentoring young leaders and working with advocacy communities to build skills.

NU sought Matchbox help to improve public service delivery and increase access to information about how local governments procure public services in South Africa. They wanted to publish every service delivery agreement contract of every South African municipality online, to make data from these contracts accessible and comparable.

As municipalities in the country are required by law to release this information, NU had already collected a significant amount of data before embarking on the project with us. The group needed support in sorting, structuring and visualizing how transparent local governments are — in a way that was much easier to understand for the public.

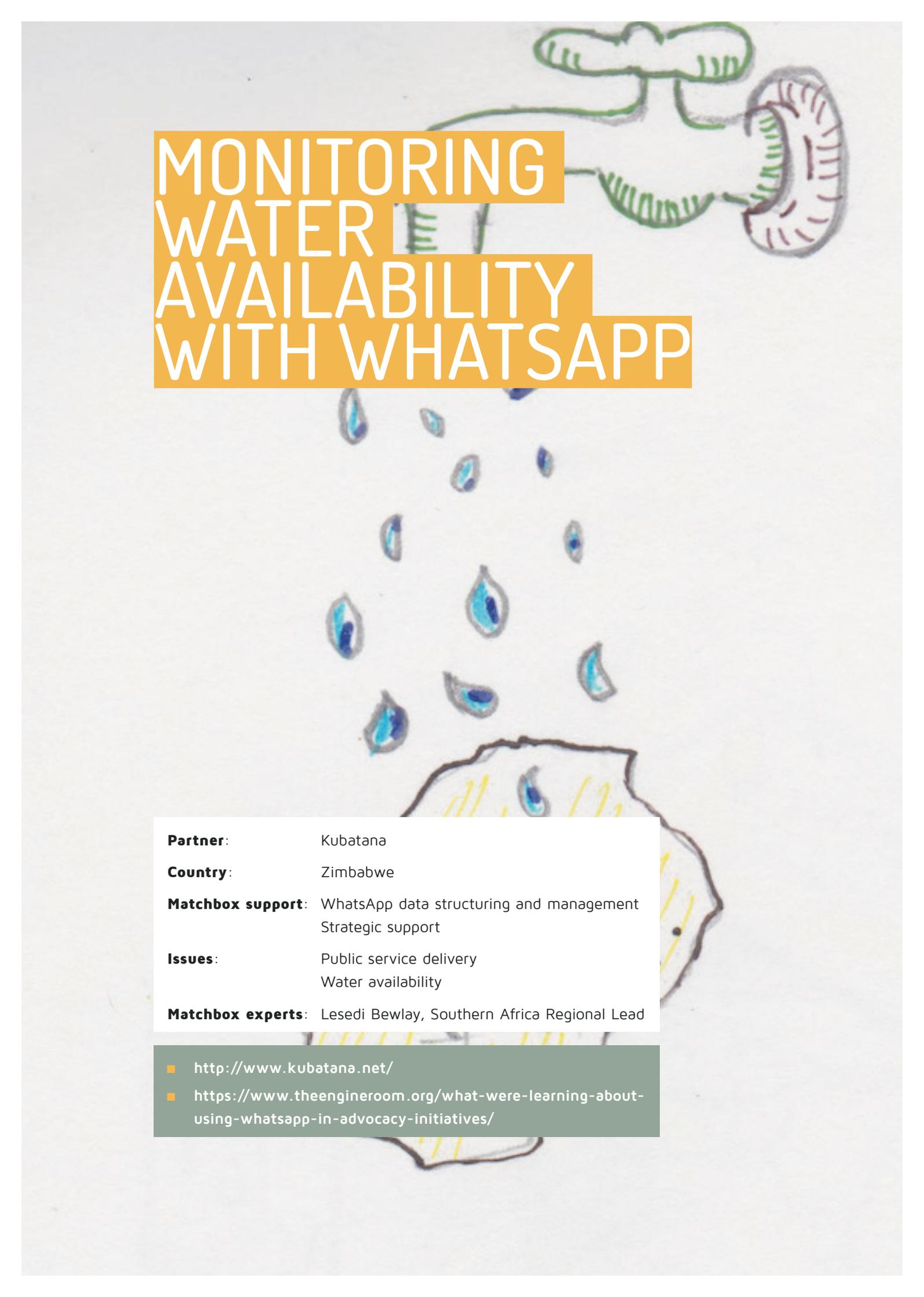
THE MATCHBOX PARTNERSHIP

The engine room worked with NU to finalize a data model for managing the contract data; customized a database so that NU could structure and host the information; developed the back and front end of the website to allow for investigation and analysis of the data; and supported the team with the strategic launch of the website.

We used underlying code from the Open Data Census to host and visualize the NU data. Code for South Africa supported the backend development, and built the site in such a way that anyone can contribute data and update the information on the platform. Once they had the data, NU ranked municipalities according to four Freedom of Information (FOI) criteria: (1) a working website, (2) a PAIA / Access to information manual, (3) details on the Information Officer, and (4) service delivery agreements (SDAs).

WHERE ARE THEY NOW?

Ndifuna Ukwazi launched the Municipality Compliance Tracker in December 2014, and are currently working on gathering the data for 2015. The process is manual and provides an opportunity for the organization to advocate for better disclosure practices in municipal contracts.



MONITORING WATER AVAILABILITY WITH WHATSAPP

Partner: Kubatana

Country: Zimbabwe

Matchbox support: WhatsApp data structuring and management
Strategic support

Issues: Public service delivery
Water availability

Matchbox experts: Lesedi Bewlay, Southern Africa Regional Lead

■ <http://www.kubatana.net/>

■ <https://www.theengineerroom.org/what-were-learning-about-using-whatsapp-in-advocacy-initiatives/>

Kubatana, a civic and human rights advocacy organization in Zimbabwe, applied to be a Matchbox partner with a very concrete ask: to help them empower their community to monitor water availability throughout their city. They wanted to crowdsource data collection on water availability and oversee the implementation of water rehabilitation infrastructure projects throughout the city of Harare.

Kubatana has a long history of using mobile communications for outreach. They successfully built on their SMS subscriber base of over 30,000 members to develop a WhatsApp subscriber base of around 6,000 people. They send regular, weekly information blasts to these subscribers on a variety of public interest issues, including news on civic and human rights. The organization wanted to use WhatsApp as a data collection tool and analyze the data to hold the city accountable and advocate for better delivery of public services. The ultimate objective was to hold the city accountable for 24/7 water supply by the end of 2015. Kubatana began collecting the WhatsApp data, sending their community members weekly requests to describe water availability in their area that week.

THE MATCHBOX PARTNERSHIP

We helped Kubatana process the information received from WhatsApp conversations and convert it into a useable format; develop a prototype tool for uploading and exporting this WhatsApp database to a web-based tool; and then export the database into CSV format to allow for spreadsheet-based analysis.

Over our three-month partnership, we worked with Kubatana to find a way to easily process their WhatsApp conversations. Our regional lead helped build a workaround solution that included a web-based tool to take an encrypted version of the WhatsApp database and import it into an online database, and then export it into an Excel file for more efficient analysis.

WHERE ARE THEY NOW?

Kubatana continues to grow and facilitate their community in Harare and across the country, and they use WhatsApp data analysis for many of their projects. At the moment they are revamping their work. Stay tuned for their Next Big Thing and see more at: <http://www.kubatana.net/2015/12/08/9115/whats-up/>.

MONITORING PETROLEUM EXPLORATION LICENSES TO DETECT CORRUPTION RISKS

Partner: Institute for Public Policy Research (IPPR)

Country: Namibia

Matchbox support: Project design
Strategic support and connection with industry experts
Data collection, modelling, and management
Web development and design

Issues: Extractives transparency
Petroleum exploration licenses
Corporate transparency

Matchbox experts: Lesedi Bewlay, Southern Africa Regional Lead
Julie Lorch
Don Hubert
Friedrich Lindenberg
Toby Marsden
Women Hack For Non Profits

■ <http://www.ippr.org/>

Namibia has been a relative latecomer to the oil boom in Africa and has largely been overlooked by big multinationals. At present, the country is not ready to manage a potential oil boom: the landscape will change dramatically once the current exploration phase is over, and oil and gas start flowing.

The Institute for Public Policy Research (IPPR) is an organisation with a mission to deliver independent, analytical, and critical research into social, political and economic issues that affect development in Namibia. Their goal was to map trends in allocation of Petroleum Exploration Licences in Namibia. By structuring and mapping the details, trends and connections in the sector, IPPR wanted to open up a system that is vulnerable to corruption. Their project idea was designed to help IPPR structure and digitize their data, and systematize the way that it manages and analyzes that information for use in advocacy.

THE MATCHBOX PARTNERSHIP

The Matchbox team provided support for IPPR to develop a platform that simplifies the process of turning oil and gas exploration data into usable formats and visualizations. We facilitated connections between IPPR and design, development, and extractives industry experts, who worked with them to build a repository of data and analyze trends in the licensing process.

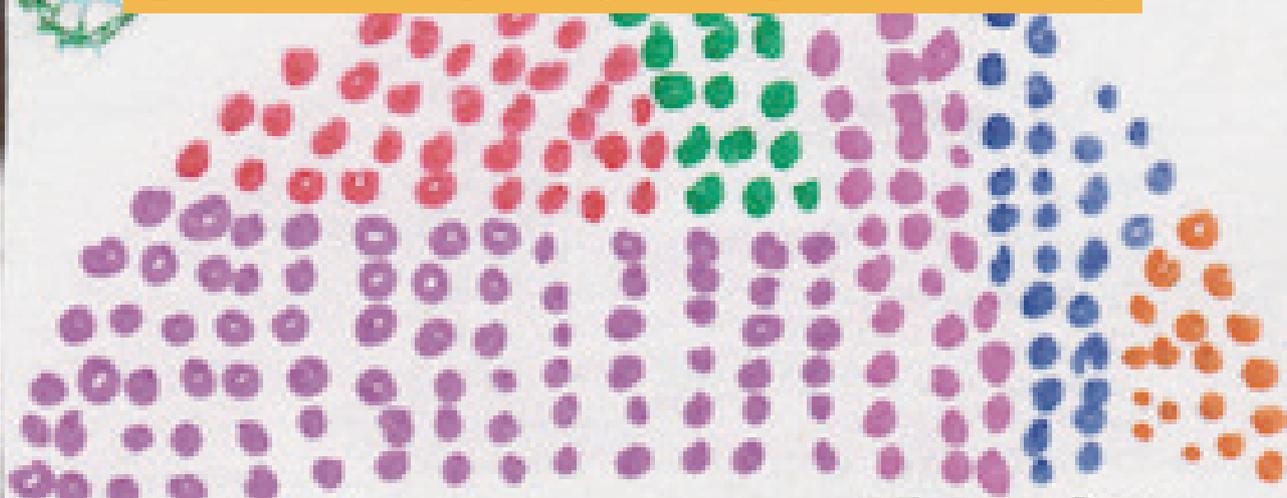
As a first step, IPPR and the Matchbox team identified the data to be collected. We created a spreadsheet as the framework for structuring the data and used a series of interrelated worksheets that now serve as the basis for what we hope to become a standard data model for petroleum related data. After further consultation, we created a more complex relational data model to capture the complexity of the data. The development of the data model was an interactive exercise that involved multiple experts.

WHERE ARE THEY NOW?

This Matchbox partnership is ongoing. We are providing continued support to IPPR on the data collection process and the launch of their project. The methodology is replicable and deployable in other contexts, and can also be scaled regionally to include other sectors of extractives, such as the licensing and allocation of mining rights. The Matchbox team and IPPR are working to make the process, the methodology and the raw materials shareable and accessible for others planning to do similar work.

TRACKING AND VISUALIZING CHANGES TO BILLS

Nación



Junio 2014

Julio 2014

Partner: Fundación Directorio Legislativo (FDL)

Country: Argentina

Matchbox support: Needs assessment
Wireframing for web platform
Fundraising and budgeting

Issues: Legislative transparency

Matchbox experts: Ela Stapley, Latin American Regional Lead
Tin Geber, Design and Technology Lead
Julie Lorch

- <http://www.directoriolegislativo.org/>
- <https://www.theengineeroom.org/turning-an-idea-into-an-action-plan-documenting-our-work-with-directorio-legislativo/>

to SMS

Fundación Directorio Legislativo (FDL) is an Argentine organization that promotes dialogue, transparency and access to public information within the country's legislature. They sought Matchbox support to develop a strategy for a tool that would track changes made to bills discussed in Parliament, so that people can understand what Congress is doing without having to search through piles of documents.

THE MATCHBOX PARTNERSHIP

Matchbox supported the project in three major areas: developing the necessary needs assessment; creating a wireframe for the web platform; and helping the organization with fundraising. This three-month partnership was more constrained in its scope than other Matchbox partnerships, but we encouraged collaboration with local service providers who can support FDL in their future activities.

WHERE ARE THEY NOW?

After a successful fundraising process, FDL now has the funding to develop a prototype, which is currently in the works.

WHAT'S NEXT FOR MATCHBOX?

After an 18-month pilot phase, the engine room has begun using the Matchbox support process in its work with a variety of sectors and geographies. And while we will be expanding our use of the Matchbox process in other sectors, Matchbox's transparency and accountability work (Matchbox: T/A) will still be the dominant area of our work. With continued Hewlett Foundation funding for Matchbox: T/A in Latin America and Southern Africa, we will work to consolidate our efforts in that sector and in those two regions. We are also exploring the possibility of expanding that support to work with transparency and accountability initiatives in the Balkans.

To expand on these successes and test new ways of improving our work, we will:

- Hold replication sprints to explore how we can build documentation and replicate support in a condensed period of time¹;
- Grow our core team;
- Expand in new regions and new sectors.
- Growing our team
- As part of our strategy to expand our work and build on the success of the pilot phase, we hired a Global Matchbox Lead (Julia Keseru) to manage the regional leads' work and implement the program's overarching strategy. The engine room's Technology and Design Lead (Tin Geber) supports the team in the design and development of the partnerships, and the planning and execution of the replications. Based in Croatia, he will also take on the role of the Regional Lead for the Balkans. Our Regional Lead for Southern Africa, Lesedi Bewlay, was onboarded in 2014. At the time of writing, we're onboarding a new Regional Lead for Latin America, Anca Matic, and a Communications Manager, Paola Mosso, to support the whole team.

1

See more about replication sprints in our 2016/17 strategy.

EXPANDING TO NEW SECTORS AND REGIONS

We will be scoping work in the Balkans, but we are also interested in working in different sectors. If you know or fund grantees who face deep data and technology challenges and are looking for the type of accompaniment and learning described in the Matchbox approach, please get in touch. Our digital door is always open. If you'd like to learn more or find out how to get involved, our strategy outlines our programmatic priorities for supporting T/A initiatives in the next two years.

the engine room MATCHBOX

The team is dispersed across three continents. **Get to know us.**

WHO LEADS MATCHBOX?

Contact **Anca** for more information about the Latin American projects
and **Lesedi** for Southern African projects.

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