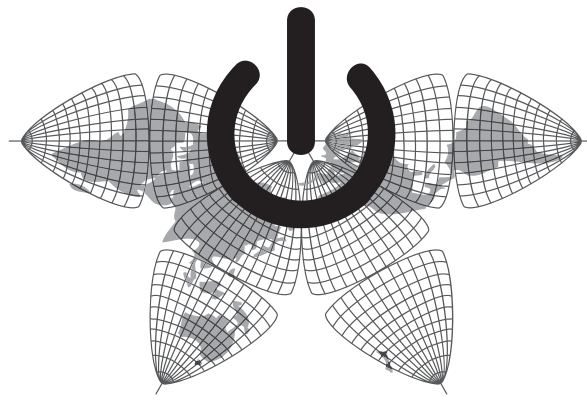


FIRST ADVISORY BOARD MEETING

The following document outlines the discussion at the engine room's first advisory board meeting.

Prepared November 2011



the engine room

INTRODUCTION

As the events of 2011 made clear, individuals have unprecedented potential to build inclusive and powerful issue-based advocacy campaigns. This is in no small part due to the increased availability of new, digital tools that are playing a role in transforming peer-to-peer communications.

From Occupy to the Arab Spring, however, the year's unprecedented degree of digital advocacy has also highlighted perils associated with this new potential. Advocates must be equipped with the skill sets necessary to use digital media as safely and effectively as possible.

Fortunately, a strong community dedicated to connecting advocates with these skill sets is already in place. The engine room is a new organization dedicated to strengthening this community through a combination of applied research and strategic services. In order to ensure that the engine room's work is demand driven, a carefully selected board of advisors was convened and met for the first time in San Francisco at the end of October.

Board meeting attendees were asked to consider gaps in the field and to outline the most valuable ways in which a new organization like ours could join them - complementing their work without sapping their resources. The meeting highlighted critical questions and needs regarding the current landscape for support digital advocacy.

WHO ATTENDED?

Kristin Antin, New Tactics in Human Rights
Brian Conley, Small World News
Eva Galperin, Electronic Frontier Foundation
Sam Gregory, WITNESS
Allen Gunn, Aspiration Tech
Derek Holiday, The Guardian Project

Emily Jacobi, Digital Democracy
Bryan Nunez, WITNESS
Brett Solomon, Access
Katrin Verclas, MobileActive.org
Chris Walker, Internews
Jilian York, Electronic Frontier Foundation

WHAT WAS DISCUSSED?

Discussion topics were chosen and prioritized by participants. Meeting facilitator Allen Gunn asked attendees to write down questions and concerns regarding the engine room initiative. This feedback was then organized according to topic and posted on a whiteboard for the group to browse and arrange according to priority.

The topic of discussion most important to attendees concerned a review of the existing ecosystem for supporting digital advocates. In addition, the group was concerned with questions surrounding how the engine room should bring new members into the community that it is building, besides those already in the room, and how it should govern this community - both in terms of vetting new participants and new training curriculum and programming.

All discussion topics raised at the meeting are presented in the diagram below.

Advisors	Partners	Accessibility	Platform	Redundancy	Audiences	Audiences (con't)	Security
Who should be in this room that isn't?	What's our target demographic or intl partner orgs?	How will we make the project multilingual?	Will we have a content policy of some kind?	Is there already a platform or organization that does this?	Which relationships between these groups are underserved?	What are you good at/not good at?	Can/must users select pseudonyms and/or transparency portal addresses?
How can my organization be most helpful?	Expectations for partners?	How will people know it exists?	How open source is it?	Competition versus collaboration?	Why would intl advocates use this platform?	Are there audiences beyond advocates, trainers, and technologists?	How will we ensure security on the platform?
How do we account for hidden assumptions on the Advisory Board?	How in future do we determine what other orgs to work with?	How will we address low bandwidth users?	How does the online platform fit into larger vision?	How is er different from similar organizations?	Who are the priorities or underserved groups?	What is the value of engine room to the activist?	Isn't it a bad idea to aggregate information about activists online?
			Primarily web based or role for mobile?		How will people be encouraged to participate?	Is there/should there be a specific geographic/thematic focus?	
			Are you a tool builder or an aggregator of tools?		Please list 10 user scenarios		
			How do we decide who gets into the network? Can we kick the "bad ones" out?				

1. WHAT IS THE EXISTING ECOSYSTEM FOR SUPPORTING GLOBAL DIGITAL ADVOCATES?

The discussion concerning the current landscape of support organizations and networks was structured according to the engine room's three primary audiences.

Training and Field-Building Organizations

Training and field-building organizations struggle to effectively collaborate with one another in part because it is difficult to understand who is doing what and when. For example, individuals - including those in attendance - tend to wear different hats according to time and context. The engine room must identify a safe way to understand and distribute information regarding who has trainings scheduled where and when, so that such efforts can be supported by the larger community, ensuring their sustainability and impact.

In order to arrive at a clearer understanding of how the engine room will partner with training and field-building organizations, it should begin with pilot projects in tandem with organizations on our board. The engine room should explore opportunities to support and strengthen training and capacity-development activities.

The following can improve the impact and sustainability of organizational trainings:

- Designing and implementing a uniform, comparable entry and exit survey for training participants;
- Coordinating training follow up;
- Designing and implementing a uniform research framework for monitoring and evaluation services;
- Providing consultations based on anonymized*, holistic understanding of the space;
- Producing reports which document this impact;
- And providing use cases that can be sent to donors and new clients.

**Training organizations we partner with will have the option to keep the information we acquire private or anonymous.*

Next step for the engine room: *Create a comprehensive list of organizations and individuals who share our mission, poll them about their work, plans and needs - including what a partnership with the engine room would look like logistically - and make this information public and anonymized when appropriate.*

Citizen Advocates

There is an insufficient understanding of how would-be digital advocates choose new tools to embed into their campaigns, as well as how they are learning the most effective and safest ways to use these new tools. Board members agreed that the channels of communication between training and field-building organizations and those individual citizen advocates towards which our efforts are targeted are insufficient.

How can the engine room improve this channel of communication? The first step should be to conduct a rigorous, global assessment of the needs on the ground. Meeting participants suggested that the engine room deploy a survey instrument that:

- Doubles as an application process for involvement in the engine room;
- Begins by approaching those advocates who frequent the "conference circuit" - and are thus easiest to identify - and moves outwards;
- Doesn't ask questions that trend towards "what don't you know about...? "
- Is informed by real time feedback to ensure that the information acquired can inform the programming of all members of the er community;
- Defines a continuum between the need for privacy and the wish for convenience as part of our definition of "user needs"
- Works towards a risk assessment for citizen advocates based on predominant tools and surveillance practices;
- Structures questions as weighted choices - for example: "rank these five services."

This research should also recognize that by working with some organizations, we may be preventing ourselves from working with others which would skew our results. To mitigate this, board members expressed willingness to bring individuals that they work with to the table in order to ensure that as many local organizations are represented and involved in the process of survey deployment.

Next step for the engine room: Conduct a global needs assessment to better understand citizen advocates' use of digital tools.

Technologists

In order to identify how the engine room can best support the work of technologists developing tools that can be used in advocacy, we must assess how these technologists are currently identifying new users and documenting successful use cases. Preliminary feedback from meeting attendees suggests that new tools are unnecessarily harder to use in part because of insufficient channels of communication between developers and users. As one board member put it, "a whole community of hackers want to build useful tools for people, but they constantly reinvent the tools...everybody wants to be the hero," suggesting that tool development too often occurs in a bubble, without sufficient iterations based on what is already available and contemporaneous use cases.

Next step for the engine room: As with the other two audiences, the next step consists of gathering information about current outreach efforts of tool developers in order to inform engine room services.

2. GOVERNING THE COMMUNITY WE ARE BUILDING

In building a community of support for citizen advocates, we are faced with foundational questions regarding how to decide which organizations we directly engage with, and which training curriculum and programming we work with and promote. The engine room advisory board's ideas for determining inclusion criteria included:

- Recommendations from trusted community members
- A committee model in which committees constitute a mix of advisors, staff, and community members based on expertise (for example, security content will be audited by neutral advisors with security expertise)
- Criteria developed by advisors, following categorizations such as nonviolence, partisanship, funding and legal status

***Next step for the engine room:** the engine room will build committees onto its board, and give these committees responsibility to vet content and community members. Our board will be consulted for suggestions with regard to committee members.*

MANDATE AND UPCOMING ACTIVITIES

Discussions that took place during the engine room's first meeting emphasized our initial value added for the community, which is to gather knowledge from the ground that will inform training efforts and tool-building. With this in mind, our next steps are as follows:

- Conduct a global needs assessment of citizen advocates' use of digital tools.
- Create a comprehensive list of organizations and individuals who share our mission, poll them about their work, plans and needs - including what a partnership with the engine room would look like logistically - and make this information public and anonymized when appropriate.
- Work with tool developers on our board to better understand their current outreach efforts and processes for informing tool development with user needs
- Consult advisors regarding additions to board and make additions with topic and expertise focused committees in mind

This information acquisition will inform our larger mandate of:

- **Making existing training and field-building efforts more effective by matching activists to tailored expertise and providing follow-up and monitoring and evaluation services;**
- **Making tools more amenable to people who use them by improving channels of communication between technologists and users.**

The engine room will engage this mandate through a combination of **applied research** and **strategic services. These strategic services will likely be buttressed by an online platform to support effective online training.** The results of these pilot projects in the field will inform a detailed outline of what the engine room strategic services can provide to each user group; this outline will be shared with the engine room advisory board. The development of the engine room's secure platform to support effective online training and capacity building will also be informed by pilot projects.

CONCLUSION

The engine room's first board meeting convened prominent members of the community we seek to join and support. The day ended with a group of activists, technologists and trainers that had committed to working together in order to strengthen their respective efforts.

As one board member aptly put it, the engine room's services can be compared to that of a general practitioner medical doctor: we work to identify problems with regard to the use of digital tools in advocacy, triage these problems according to urgency, and match them with the most appropriate and specialized training/support organizations. Our training partners serve niche areas - just as specialized doctors do - and by drawing on their resources in a targeted fashion we can maximize their impact, while simultaneously providing citizen advocates with a carefully selected array of expertise.