

2016  
2017



the engine room

# WHY WE WERE FOUNDED

The engine room was founded to support the work of social change initiatives **seeking new ways to address problems**. We wanted to make it easier for activists and advocacy organizations to successfully navigate the growing number of technology and data tools at their disposal, and to contribute to an overall understanding of how technology and data influence social change work. Five years have passed, and today the diversity and volume of possibilities for using technology and data is perhaps even more overwhelming. As we have grown in size, skill, experience and knowledge, we have experimented with different approaches to addressing the seemingly endless demand for support. This strategic plan spells out our mission, the goals we have set to achieve our mission, and how we will use the next two years to accomplish those goals.

This strategic plan will cover:

- Our mission
- Who we are now
- What problems we see
- Our hypothesis of change
- Our three streams of work
- Where our team is headed
- & the values that will help get us there

# OUR MISSION

The engine room exists to accelerate **positive social change**.

We do this by supporting social change initiatives to effectively use technology and data in their work.

We define positive social change as shifts in society that promote equality, access to justice, exercise of rights, good governance, and accountability.

We believe that because we are untethered from a particular social change sector we are better able to circulate effective strategies, provide demand-driven support, and bring fresh ideas and approaches that can have a big impact.

# WHO WE ARE NOW

We are a team of 12 strategists, researchers, technologists, and advocates based in 9 countries.

The internet is our office.

We forge partnerships with social change organizations and work with them to tactically and strategically adopt technology to further their social justice objectives.

We work to make a tangible and positive difference for our partners while producing reusable documentation and resources to make a positive difference for other organizations that we do not directly support.

# OUR GOALS

**01**

Empower a growing number of social change initiatives to increase their impact with data and technology; and build their capacity to make strong technology and data decisions in future work

**02**

Support the effective uptake of data and technology to press for accountability of the powerful and empowerment of the public

**03**

Cut down on the waste in funding of civil society's adoption of tech and data

# WHAT PROBLEM ARE WE WORKING TO SOLVE

Most social change organizations are either considering or actively incorporating technology and data into their work. We think technology and data are wonderful resources inasmuch as they can: improve operational efficiency, support stronger decision-making, unlock information, allow for previously impossible analysis, broaden reach of important messages, make long-distance collaboration possible, strengthen advocacy, and excite recalcitrant allies and adversaries.

Unfortunately, most organizations go through a resource-intensive and distracting process of haphazard testing to identify how technology and data can truly improve their work. And once they have an idea for moving forward, it is difficult to determine what strategic and technical resources they need to design, implement, and maintain a project with technology components. The problems we are working to solve are a **lack of capacity** within social change organizations (both in terms of resources and hands-on experience) to effectively incorporate technology and data into their work and a **lack of accessible knowledge** about what works and what doesn't.

# OUR HYPOTHESIS OF CHANGE

To address these problems, and thereby reach our mission of accelerating positive social change, we have built three streams of work:

- we provide **direct support** to social change organizations,
- we develop and contribute to problem-focused **communities of practice**, and
- we carry out **documentation and research** to inform and strengthen both of these activities.

Based on our assessment of the problem, we believe that investments in these three areas will move us towards all three of our goals.

# STREAMS OF WORK

## DIRECT SUPPORT

For the past 5 years we have supported partners to cut through data and technology hype and challenges to successfully adopt new tools in their work. In the course of that support, we have seen that in most cases it is unnecessary and unrealistic for every organization to have in-house hard technical capacity; but every organization can and should have the in-house strategic capacity to consider and manage their own technology and data projects so that they adopt technology and data in ways that improve their work. The most critical resource for an organization exploring the adoption of technology and data isn't coders, or web developers, or statisticians, or tablets, it's demand-driven support and strategic capacity.

**In-house strategic understanding of technology and data** can:

- improve the effective adoption of technology and data within an organization
- reduce costs for organizations
- decrease reliance on outside 'experts' that can be costly and unhelpful
- allow for more efficient management of outside experts
- allow for more successful innovation
- prevent technology from becoming a distraction
- prevent organizations from unintentionally causing harm
- lead to greater impact for individual organizational goals and for civil society as a whole

We have developed a unique style of support that is designed to build strategic understanding of technology and data in our partners while at the same time completing specific high-impact projects with reusable components.

Our in-depth support and accompaniment on discrete projects includes: hypothesis of change development, project design support, scoping and feasibility research, idea refinement, project plan development, responsible data strategies, user experience support and design, technical recommendations and planning, budget development, and matchmaking with experts and support organizations.

We feel that the more social change organizations are able to proactively use technology and data to further their causes and improve their operations, the better able they will be to make a positive impact and the world will be a better place for it. If our support team can provide social change organizations with the demand-driven support they need to build high-impact projects, we believe that we can make real-world change at a project, organizational, and sector level.

### **Our Support Objectives**

- Increase the capacity of organizations to use technology and data effectively
- Support projects that create demonstrable positive change in the world
- Provide the best technical and strategic support possible for social change organizations
- Develop the abilities of all of our partners to strategically adopt technology and data to support their work
- Grow the number of partners we can work with by streamlining our methods
- Identify opportunities to replicate projects and processes in other contexts to better understand what documentation can reduce costs and increase success of customized replication of common technology projects
- Create and promote reusable components that are adopted by other social change organizations in a way that conserves resources

## **RESEARCH AND DOCUMENTATION**

For the engine room, research is a practice rather than a product; we see it as useful to the extent that it positively and practically affects the way technology and data are used. We use research and structured documentation to organize and evaluate our work, support our partners to make thoughtful decisions, and generate more evidence about what works – and doesn't.

For the last five years, we have focused on generating more evidence about the role that technology and data play in different kinds of advocacy, drawing attention to research that is relevant to practitioners' needs.

This approach has produced a growing body of work, available in different formats and forums — from peer-reviewed publications to blog posts — and attempts to answer some of the most pressing questions our practical, direct support has highlighted.

We believe that there is clear and urgent need for more accessible data and information about how data and technology can positively influence the work of social change initiatives. In the coming year, our research strategy will focus on one specific area: decision-making. We define **decision-making** as the point at which an organization or group makes choices about what, whether and how they will use technology and data in their work.

We will build on our existing research and documentation work and:

- continue to conduct **research**,
- systematize our documentation,
- **collate relevant findings**,
- support honest debate about how technology and data influences social change work,
- and experiment with and evaluate ways to share and disseminate research findings that are accessible for busy practitioners facing unique challenges.

#### **Our Research and Documentation Objectives**

- Contribute to rigorous understanding of what works and what doesn't in using technology for social change
- Develop a research strategy that we can implement with the resources we have
- Lead by example and apply our in-house research capacity to effectively evaluate and influence our own work
- Increase the quality of our direct support work by refining it with research
- Increase the number of organizations we can support by developing accessible documentation based on our direct support experiences

# COMMUNITIES OF PRACTICE

In 20 years' time, social change organizations will have made great strides in developing capacities to strategically consider technology and data. Those that don't will likely be extinct. In the interim, we think community creativity, inspiration and resource coordination are critical to supporting social change organizations and initiatives. Our support work is powered in part by our strong community connections. We invest heavily in **connecting** (through events), **understanding** (through conversation and working with partners), and **collaborating** (through hands-on projects and partnerships). We work with other support organizations, researchers, technologists, and social change organizations. We believe that active communities of practice can lead to more sustainable solutions for using technology for social change. But technology is so fast-paced that there will always be a need for responsive support from a collection of diverse perspectives and expertise. For now we will continue developing and contributing to communities of practice that:

- address new and particularly complex problems (like **responsible data**),
- coordinate emerging ideas and approaches (like **organizational security**),
- and unify strong resource providers and advocates that we can call on to provide the right support at the right time for our partners (like **Matchbox**, our flagship support format).

## **Our Community Objectives**

- Build a community of practice around the strategic use of tech in advocacy so that our Matchbox partners and other social change organizations can benefit from sustainable networks of support
- Grow and maintain a responsive, supportive, and increasingly proactive community of responsible data practitioners
- Productively engage with the research community to encourage focus on practitioner needs
- Establish the engine room as a community hub for research findings that support better decision-making in funding, building and using technology for social change
- Identify and prioritize partnerships with communities of local technologists for partner support

# OUR ORGANIZATION

## WHAT MAKES US DIFFERENT?

The engine room is unique but not alone. We work very closely with other support organizations, and have adapted to add value to the existing ecosystem of support. What makes us different is not just the work we do, but the approach we take. We work to provide responsive support and have built an effective team that can respond to need in a way that no other organization we have encountered can. When a social change group emails a support organization for general assistance with data and technology, the response (if there is one) is usually a templated email of links and programmatic offerings. We respond every time with tailored information, and if there is a good fit and we think that a collaboration will lead to real-world impact, we engage and work to make it happen. We also maintain strong relationships with other support organizations that have specialized areas of capacity development and support, and we refer frequently when we think it would be mutually beneficial. These attempts to improve coordination of support resources for groups seeking assistance set us apart.

With this approach, we have also built a resilient earned income stream that has made us less reliant on grant funding, and has strengthened the quality and efficiency of our work. **The juxtaposition of our direct support, research, and community development positions us well to be thinkers and doers.** And our broad support of a variety of social change initiatives places us well to promote cross-pollination of ideas and resources between communities.

# ORGANIZATIONAL VALUES

Our organizational values reflect the type of organization we strive to be.

We aim to:

- be transparent
- be responsive and provide professional, effective assistance
- be inspirational but pragmatic<sup>1</sup>
- package our work so that it is reusable and accessible, and share by default
- challenge ideas
- test our assumptions with rigor and research
- let no success or mistake go to waste

Living up to these values isn't always easy. In the next 2 years we will:

- more effectively use our research and documentation methods to evaluate and grow our support to partners and our strategic planning.
- improve our internal knowledge management about our network to increase our ability to match partners with the right support at the right time.
- document and streamline our support services.<sup>2</sup>
- expand what reusable (and accessible) resources we develop through our support work and increase their exposure.
- devote more resources to organizing convenings between partners and experts.
- raise more unrestricted funding to allow increased flexibility in our support.
- increase our critical skills in the following priority areas: human resources support, research methods, data analysis, and advocacy strategy.
- grow our board to 5 experts with complementary skills, backgrounds, and expertise.

1 We do not drink or serve Kool-Aid.

2 Streamlining our services will include efforts to reduce management overhead for our projects, improve our efficiency, more consistently document and publish lessons learned, develop micromanuals for common problems and processes, increase revenue, and build in-house expertise.

# WHAT WE WON'T BE DOING

We work to be a demand-driven, flexible organization. That means it can be challenging to say what we don't do for fear that it might limit us in unhelpful ways. That said, living up to our values also means knowing when to say no. Things we won't do:

- One-off trainings
- Pursue projects that we think others can do better (when that happens, we proactively connect with those better positioned to provide support)
- Build branded tools or software
- Allow funding pressure to lead to mission drift
- Carry out consultancy work that we don't think will lead to change in a partner or in the world

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