**Proposed guidelines of an engagement process**

**Data scientists and nonprofits**

The following are suggested elements to build into data intermediary and nonprofit working projects. They draw from other forms of technical assistance and pro-bono work and focus specifically on the types, uses, and challenges of digital data.

1. All projects should begin with a *funded* discovery process that includes the party identifying and agreeing to the core problem to be addressed, the data to be made available, a review of the data by all parties, agreement on communication (internal and external) parameters, beneficiary identification and participation expectations, and clear statement of intended project deliverables.

2. A map of the data lifecycle and the allocation of responsibilities of different partners at each stage to the data, the people from whom it is collected, and the project partners should be begin immediately after the discovery process. Samples are available from the Responsible Data Forum.

3. Jointly agreed upon terms of success for each stage of the work should be discussed and documented.

4. Parties should identify the predictable transition points throughout the project and state a process by which either party may terminate further work at those points.

5. The intended beneficiaries of the work beyond the immediate project partners, and their role or representation during the project should be identified and documented as part of the project plan.

6. For what reason, and how, will the data and data models be added to existing organizational decision making processes?

7. Sustainability and maintenance goals for the models and data collection efforts should be identified upfront, and progress toward securing them shared as a regular part of project management.

8. Work plans should include review of known sources of data bias, algorithmic assumptions, and appropriate applications of model between the partners. This review should identify other stakeholders whose input will be sought and identify how and when that will happen.

9. Agreement about use and ownership of project data, data tools, algorithms, models and final products should be determined upfront.

10. Who is liable for what?

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