

**A look back:
the outcomes of the first
batch of FDC grants**

WMF Learning Series, Jessie Wild Sneller
18 June, 2014

Overview of Round 1 2012-13 Annual Plan Grants

0. Overview: who was funded?
1. How did the orgs spend their funds?
2. What progress was made on our strategic goals?
3. How did the organizations develop?
4. What did we learn from our 2013 grantees?

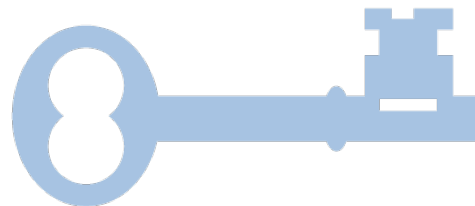
Overview of Round 1 2012-13 Annual Plan Grants

0. Overview: who was funded?

1. How did the orgs spend their funds?
2. What progress was made on our strategic goals?
3. How did the organizations develop?
4. What did we learn from our 2013 grantees?

Wikimedia Foundation Grantmaking

we believe that well-targeted resources are the key to uncovering innovative ideas and strategies to help achieve the movement's goals.



*participation online * readership * quality content * gender diversity*

Organizations are funded to make progress towards Wikimedia Movement strategic priorities in their local areas

Increase Participation

Sample programs:

- Editathons
- Meet-ups

Sample impact metrics:

- # of new editors
- # of active editors

Improve Quality

Sample programs:

- Education program
- GLAM partnerships
- Wiki Loves Monuments

Sample impact metrics:

- # of new articles
- # of quality images

Increase Reach

Sample programs:

- Offline Wikipedia
- Social Media campaign

Sample impact metrics:

- Increase in pageviews
- # of new readers

Encourage Innovation

Examples:

- New programs (e.g., WikiMini)
- Process changes on old programs

Sample impact metrics:

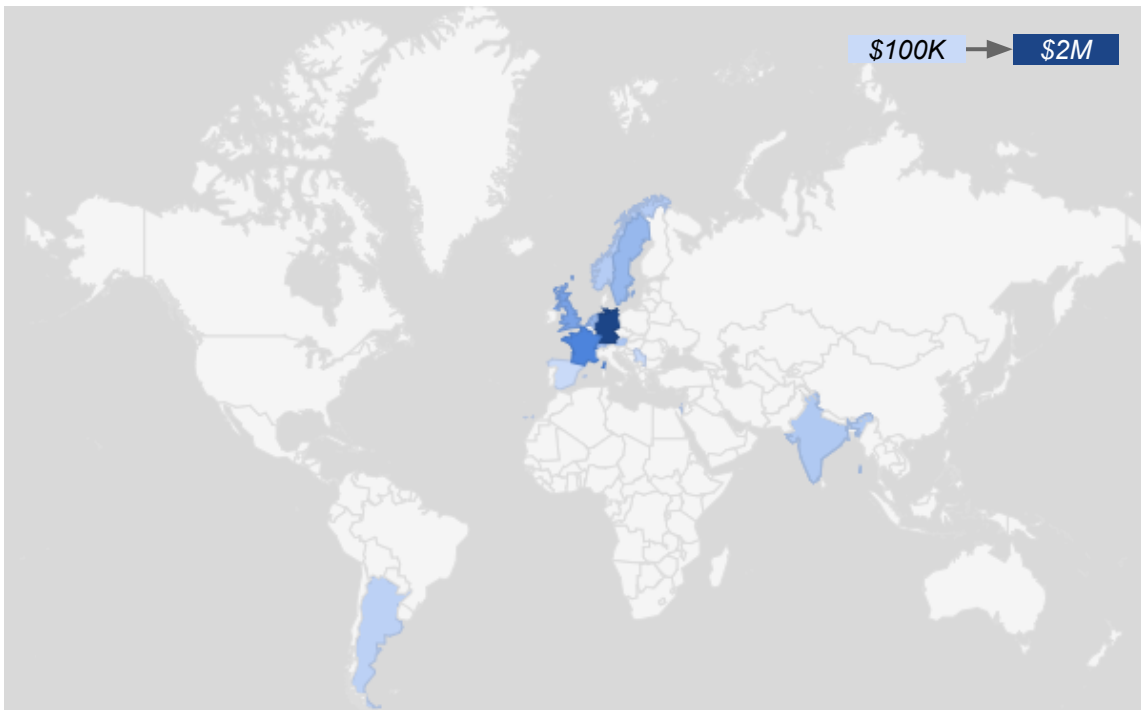
- # new users
- Change in outcomes after new process



We used the impact reports to see how funded organizations made progress on these strategic areas

Since its inception, the FDC has allocated over \$10M in funding to 15 organizations

Relative FDC allocation by country, 2013-14



Total FDC funding, 2012 - 2014

Organization	2012-13	2013-14
Centre for internet & Society		\$194K*
Wikimedia Amical		\$100K
Wikimedia Argentina	\$147K	\$175K
Wikimedia Austria	\$220K	\$276K
Wikimedia France	\$619K	\$826K*
Wikimedia Germany	\$1,790K	\$1,750K
Wikimedia Hungary	\$64K	
Wikimedia India		\$53K
Wikimedia Israel	\$141K	\$200K
Wikimedia Netherlands	\$350K	\$410K
Wikimedia Norway	\$140K	\$215K*
Wikimedia Serbia		\$108K
Wikimedia Sweden	\$342K	\$390K
Wikimedia Switzerland	\$390K	\$400K
Wikimedia United Kingdom	\$536K	\$570K
Total:	\$4.740K	\$5.567K

* Amount recommended by the FDC to the WMF board, but not yet confirmed

Each funding round yields a variety of rich information; after three rounds of funding, we have a full set of data for one round

✓ = completed

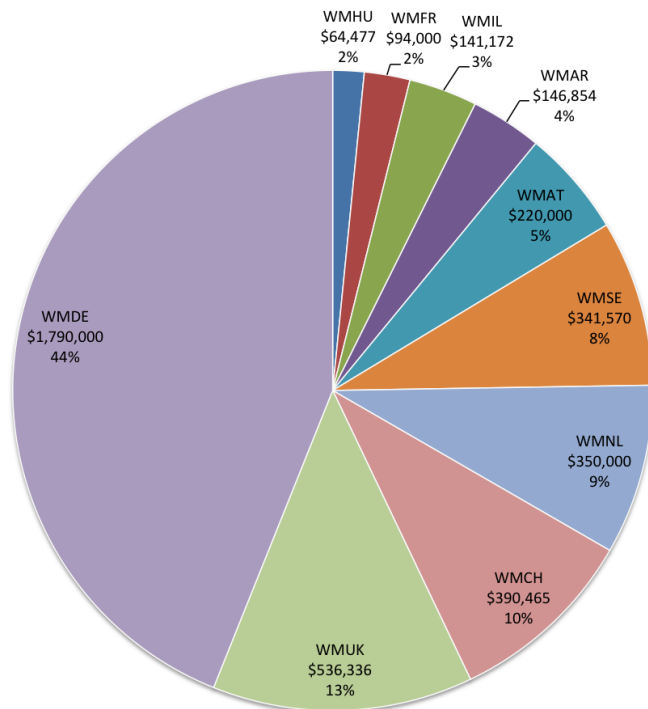
See: [APG Proposal and Reporting Timeline](#)

	Round 1 2012-13	Round 2 2012-13	Round 1 2013-14	Round 2 2013-14
Proposal	✓	✓	✓	✓
Q1 Report	✓	✓	✓	Oct-2014
Q2 Report	✓	✓	Jul-2014	Feb-2014
Q3 Report	✓	✓	Oct-2014	May-2014
Impact Report	✓	Sep-2014	Mar-2014	Oct-2014

This report is focused on the first round of funding for which we have a full set of data; it includes basic funding information on the other rounds

In Round 1, 2012-13, the FDC allocated \$4M to 10 organizations (excluding WMF)

Funding Allocated by Organization



Average Grant Amount: \$270K

(Excludes WMFR and outlier WMDE)*

% of funds requested received: 87%

*Range of funds received**:* 58 - 100%

% distribution to Europe: 93%

59% of funding went to chapters working primarily on German Wikipedia (WMDE, WMAT, WMCH)

* Wikimedia France received \$94K for 6 months of “bridge funding;” they applied for a full 12 months of funding in round 2 (and received \$525K)

** Wikimedia Australia did not receive funding due to compliance issues

A note on the data presented in this document ...

This report relies on the reporting accuracy and consistency of our movement partners. FDC grantees self-evaluated and reported about their inputs (money, time, people, etc) and their outputs/outcomes (quantity of activities they have conducted, material produced, individuals reached).

The data gathered through the reports is good, but it is incomplete: we do not have a comprehensive set of information. We know there are more things - articles, photos, events - which happened than are captured here.

Data Limitations

- *Inconsistent **metrics** reported (e.g., # of articles, # of events, # of participants)*
- *Inconsistent **definitions** (e.g., “Membership,” “Administrative expenses”)*
- ***Incomplete** data sets reported (e.g., only the number attendees for a sample of events per organization)*

Overview of Round 1 2012-13 Annual Plan Grants

0. Overview: who was funded?

1. How did the orgs spend their funds?

2. What progress was made on our strategic goals?

3. How did the organizations develop?

4. What did we learn from our 2013 grantees?

\$6.4M of total revenue (APG + other) was spent on staff and administration, or 75% of total budget

Orgs have grown staff

Orgs have rented office space

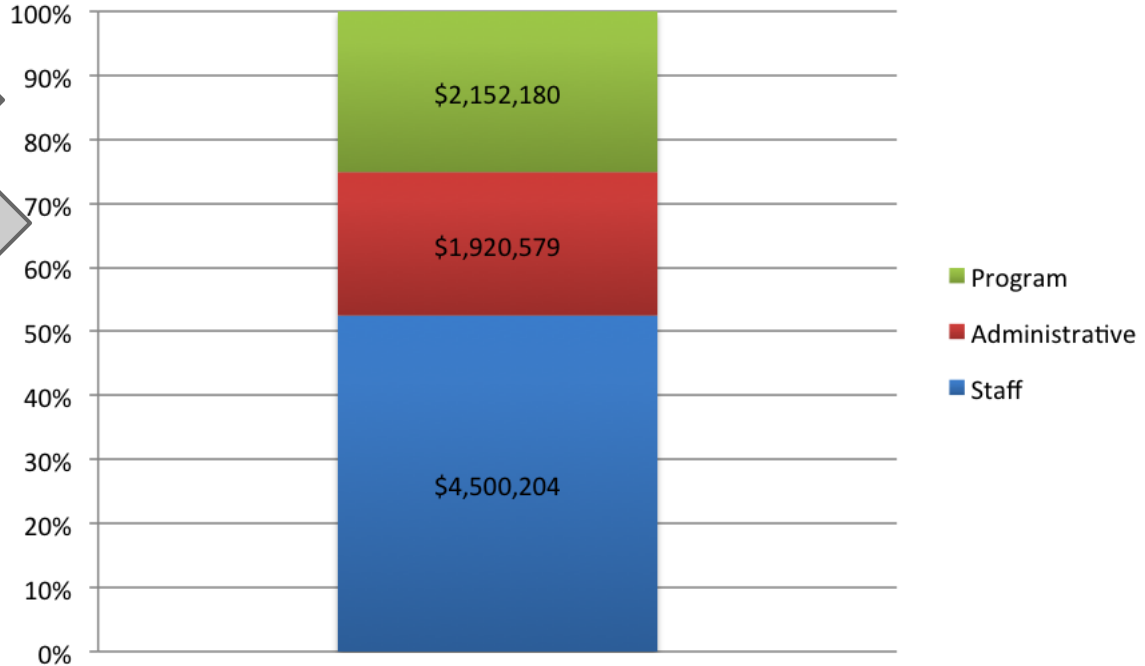
Orgs have built out governance

Important notes:

Program spending does not account for the cost of staff to plan and execute programs.

Many organizations reported that program expenses were reduced due to in-kind contributions.

Spending by Category on Total Revenue



* WMHU and WMFR not included in this chart, due to non-annual grant periods

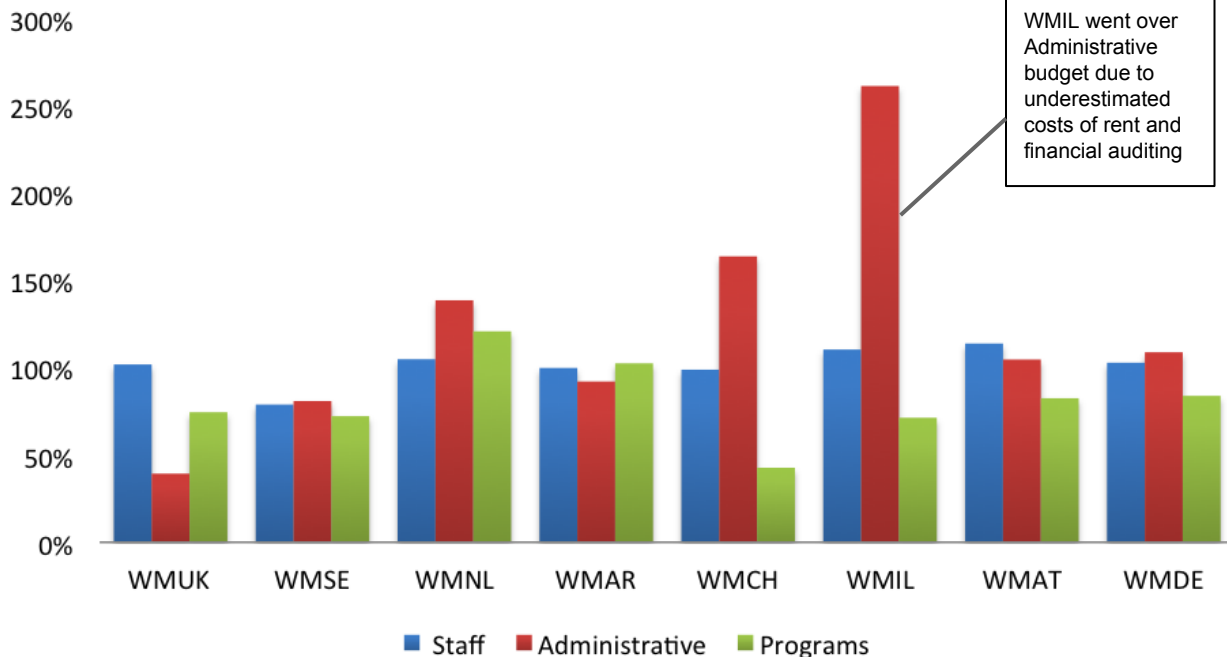
After receiving final FDC allocations, program funding was cut by 19% to cover staff and administrative costs

Many organizations who received less funding than planned cut back on programs but did not reduce spending elsewhere.

On average, organizations were 24% over budget on administrative spending.

- Some chapters did not accurately estimate startup costs
- Successful fundraising programs led to increases in processing costs
- Board governance issues led to increases in board meeting expenses

Spending Against Budget

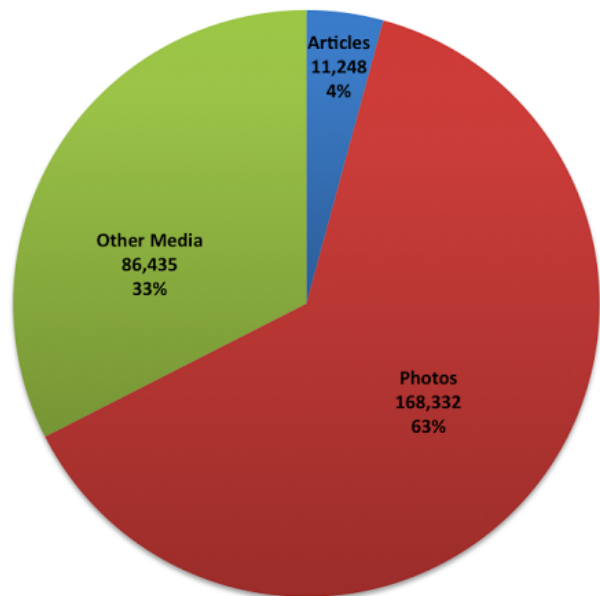


Overview of Round 1 2012-13 Annual Plan Grants

0. Overview: who was funded?
1. How did the orgs spend their funds?
2. What progress was made on our strategic goals?
3. How did the organizations develop?
4. What did we learn from our 2013 grantees?

Partners are doing work, however, we have an unclear picture of impact due to difficulties in measuring and inconsistent reporting

Online Impact of 2012-13 Round 1
Annual Plan Grants



Note: the following numbers represent only reported numbers; they are the minimum activities

- **Events:** ~520
- **People reached:** ~12,300
(includes active editors of WikiData)
- **Scholarships:** ~600
- **1 new project:** Wikidata

WMDE and WikiData

- 3,900 active and 600 very active editors
- 92.5 million edits
- 24 million statements



There chapters collectively receiving <15% of FDC allocated funds reached over 30% of total people touched

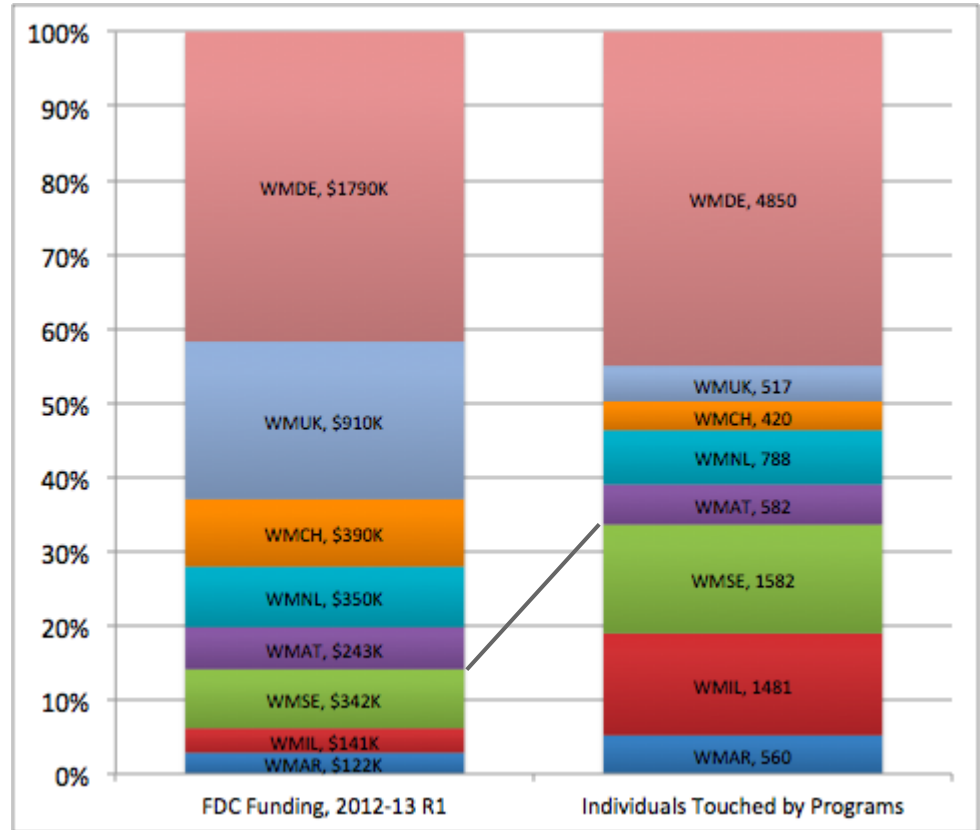
On average, chapters reported **51 offline events**

- WMSE reported 112
- WMIL reported 87

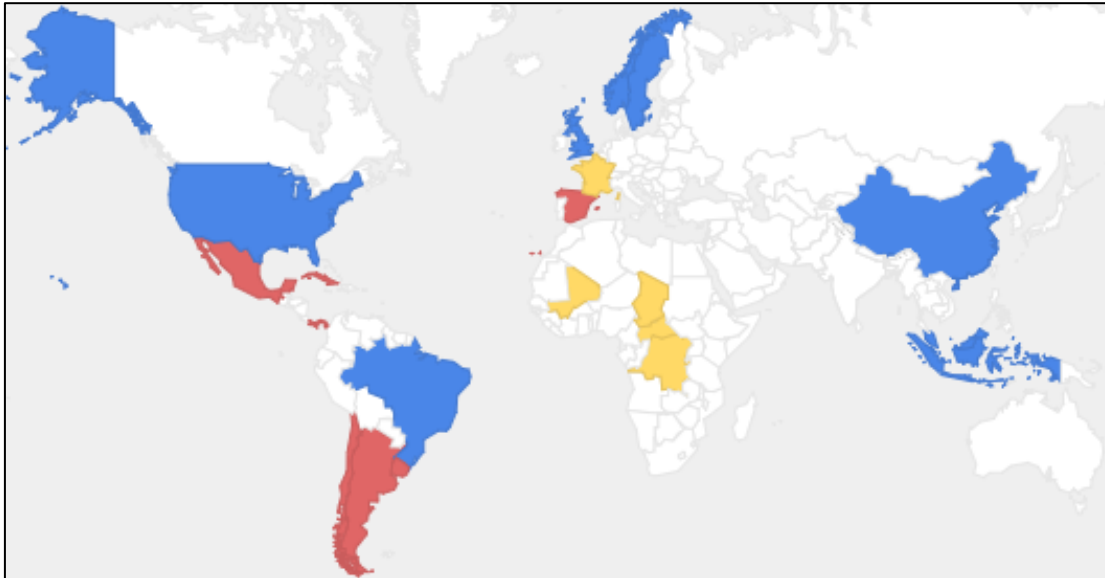
Individuals touched by programs is not a full reflection of chapter activity:

- inconsistent reporting
- difficulty evaluating reach of projects and activities conducted online
- figures may not include attendance at conferences

* WMFR not included in this chart, due to non-annual grant periods;
WMDE includes Wiidata project



Annual Plan Grants have impact beyond the primary languages and geographies of funded organizations



- Mujeres Iberoamericana contest participants (WMAR)
- Afripédia events (WMFR)
- Swedish education video translated in local language (WMSE)

Global and Regional Initiatives from FDC Funding:

- WMAR produced neutral language materials and organized [writing contests](#) for users across Latin America and Spain.
- WMSE produced a [video](#) as part of their education program that was translated into 8 languages and is in use on 7 pages
- Several European chapters contributed to the [GWToolset](#) which supports mass uploads to Wikimedia Commons.
- WMFR supports [Afripédia](#), reaching 131 new users at universities in 5 Francophone African countries.

Grantees demonstrated the most success in quality of content related projects

Key Takeaways:

Local GLAM partnerships and education programs benefit from long term staff and are a key value-add of more formal organizations.

Contests, like Wiki Loves, generate significant content and new users.

Organizations are working to become more connected to editor communities. Some are distributing mini grants and supporting contributors through access to technology and events, which is directly adding content to the online Wikimedia projects

[GLAM](#) initiatives bring important documents online, but successful partnerships can require significant investment of staff or volunteer time.

- **58 GLAM partnerships**
- **1,809* documents/photos/files** uploaded to Commons per partnership

[‘Wiki Loves’](#) photo contests are popular with volunteers, engage many new users and generate considerable content. However, only 1% of photos are recognized as ‘Quality Images’ and many organizations report it is difficult to retain new contributors.

- **107,364 photos** added to Commons through [WLM](#) and other photo contests.
- **1,788 participants** reported* in 15 contests

* Based on reports from 5 chapters.

[Technology Pools](#) make high-quality equipment available to the community to document important national events.

- **583 users supported by 5 chapters**
- **73,098 photos, videos and sound recordings**

Overview of Round 1 2012-13 Annual Plan Grants

0. Overview: who was funded?
1. How did the orgs spend their funds?
2. What progress was made on our strategic goals?
3. How did the organizations develop?
4. What did we learn from our 2013 grantees?

In 2013, organizations grew staff to reach program goals and attempt to build more local effectiveness

Strategies for expanding human capacity

Full Time program staff

*"Having an Education Manager, one GLAM-technician and a CEO **made all our work both more effective and efficient.** If we had not had an Education Manager, the entire program Free knowledge in education would have come out with a lot less value towards the movement goals."*

Wikimedia Sweden

Consultants

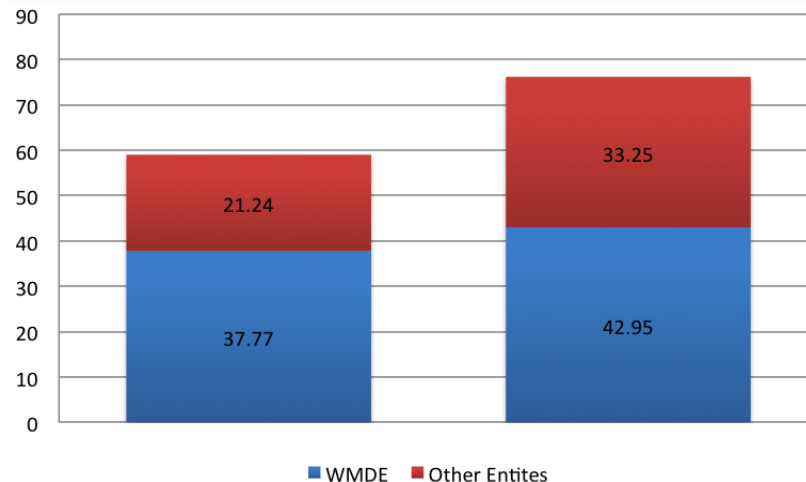
Sample activities: needs assessments, translation services, governance strategy

- fewer board meetings needed (UK)
- less staff time spent on translating reports (FR)
- clearer and more consistent metrics (UK, FR)

Part-time staff

- Enables hiring of multiple skillsets

FTE growth from 2013-2014

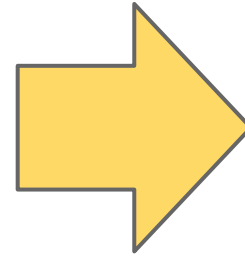
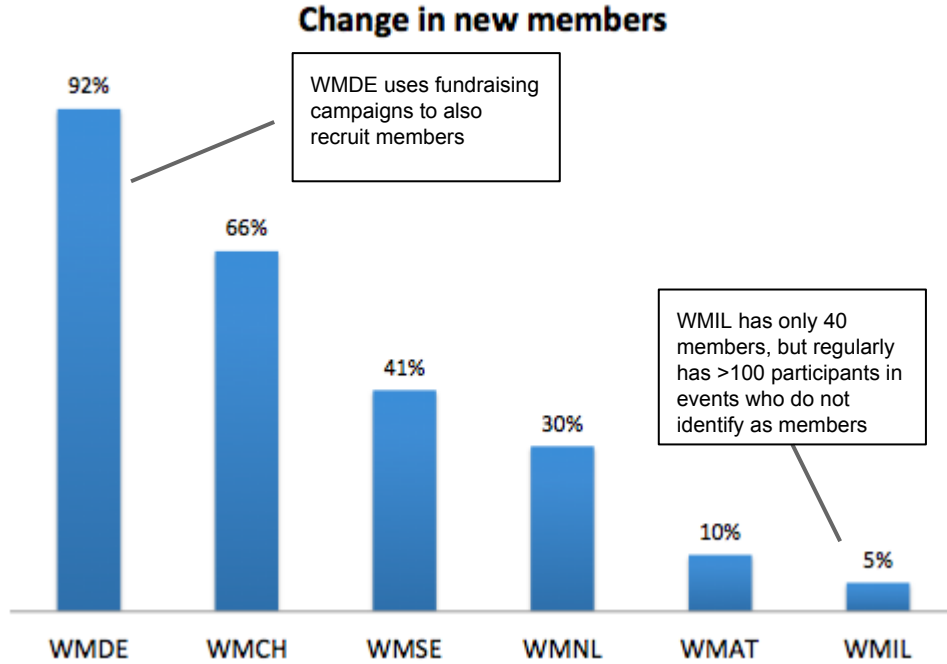


Total new staff: 17.3 FTE

Average staff growth (non-WMDE): 69%
(range 24-263%)

WMDE staff growth: 14%

Over 11,600 members were reported in FDC funded organizations; membership grew across most orgs



*Chapter membership is a **limited measure of org effectiveness** as it is defined differently by each organization and is not correlated to programmatic impact*

* WMAR, WMUK, WMHU and WMFR did not report on growth in membership.

Overview of Round 1 2012-13 Annual Plan Grants

0. Overview: who was funded?
1. How did the orgs spend their funds?
2. What progress was made on our strategic goals?
3. How did the organizations develop?
4. What did we learn from our 2013 grantees?

Common challenges were identified by organizations

Program

Community engagement: Organizations faced some difficulty establishing relationships with local editors; small grants have been harder to distribute than anticipated. *Some reports indicated that hiring 'Community Liaisons' has been [an effective way](#) to mitigate these issues.*

Prioritizing partnerships: Many organizations report receiving more requests for education programs and GLAM partnerships than they are able to take on. *Frameworks for identifying goals and prioritizing opportunities are needed.*

Program development: Organizations found they could not carry out the full slate of programs described in grant proposals. *[Targeting specific groups](#) or focusing on a smaller set of goals when developing programs could lead to better outcomes.*

Volunteer management: Chapters struggle to recruit and manage volunteers, and have volunteer burnout. *Chapters may benefit from guidance in recruiting new volunteers, volunteer friendly reporting tools, volunteer-staff working relationships.*

Organizational

Reporting: It is clear that some entities have more facility with English and narrative reporting than others. *Recommending the use of a translator may save time and lead to clearer reports.*

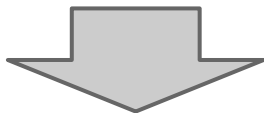
Estimating Budgets: Several newer entities reported budget variances due to difficulty estimating costs for office space and hiring, VAT, and auditing expenses. *It may be helpful to provide guidelines for entities who are establishing offices for the first time.*

Hiring and onboarding: Several entities reported that hiring employees has been a challenge. *[Learning patterns](#) with best practices for recruiting, interviews and new employee onboarding would be useful for many entities.*

Governance: Issues with board governance led to higher administrative costs. *WMF may be able to provide guidelines for recruiting and managing effective boards.*

Potential reasons for gaps in data

- Self-evaluation was encouraged; no specific metrics required in reports
- Many organizations began tracking only part-way through the year
- Some (many?) volunteers with organizations were unable or resistant to reporting outcomes and other metrics
- Lack of evaluation knowledge



Aligning organizational and offline activities to online metrics is hard work! **We must continue to build our capacities to evaluate to increase our understanding of impact**

At the conclusion of the first full year of funding expenditures, several takeaways emerge

- Organizations are prioritizing staff and administration costs over program costs
- Learning is taking place, but little of it has been systematically documented in learning patterns
- APG Grantees respond relatively well to specific reporting requirements (e.g., budget, hiring) but had a harder time self-reporting on the more open program questions
- A clearer understanding for what it means to be an effective Wikimedia organization is needed; potential work needed on “organizational effectiveness” metrics and linkages to impact
- Challenges in reporting program data by chapter, and rolling it across chapters; support is needed to develop tools and guidelines for better measuring both programmatic impact

Some next steps

- **Reports:** FDC Staff to reconsider revising reporting requirements, so that orgs can put more focus on quality for the ones that are filled out
- **Learning patterns:** improve functionality and searchability of the learning pattern library, so that orgs can share learning in this codified method throughout the duration of programs
- **Organizational Effectiveness Indicators:** engage in research on what it means to be effective as a Wikimedia organization, and develop a tool enabling organizations to self-monitor this
- **Global metrics:** continue to socialize volunteers to the [tracking and reporting toolkits](#); set up a few key metrics to be tracked globally by organizations and groups working on programs

What are your thoughts? Questions? Concerns?
