

2013–14 Year-to-Date and Lookahead to Planning for 2014–15

WMF Board of Trustees Meeting
31 January 2014, San Francisco
Prepared by WMF senior staff



Background & context

This is the one time each year in which the Board gets a formal presentation from the full senior team on the organization's activities. For the past two years you have found this useful and asked us to keep doing it.

This will be mostly a download.

But, feel free to ask questions throughout. There will be time for preliminary discussion at the end, as well.



Goals

1. To share with the Board what's happened in the first six months of 2013–14
2. To equip the Board to give direction to the C-team as we begin planning for 2014–15



Agenda

- 1. RECAP 2013-14 TARGETS (Sue: 20 minutes)**
2. 2013-14 SIX-MONTH ACTUALS (Erik, Frank, Anasuya: 120 minutes)
3. LESSONS LEARNED THUS FAR (Sue: 30 minutes)
4. QUESTIONS/DISCUSSION (All: 30 minutes)



Recap: 2013-14 plan finances

"The 2013-14 plan calls for a 1.6% decrease in revenue from 2012-13 projections, to \$50.1 million. We plan to increase spending from 2012-13 projections of \$38.5 million to \$50.1 million. The reserve is not planned to grow as an additional \$5 million over plan was added to the reserve in fiscal year 2012-13."



Recap: 2013-14 plan staffing

"In 2013-14, we plan to grow the staff 15% to a headcount of 192, an increase over 2012-13 headcount of 15%, representing significantly lower staffing growth than in previous years."



2013-14 Plan Targets

Visual Editor

By end of December 2013, after additional stability improvements and bug fixes, Visual Editor will be deployed as the default editor for most Wikimedia wikis, beyond the July Wikipedia rollout. By end of June 2014, opt-in experimental real-time collaboration and chat will be deployed to production, leading to full build-out in the default mode in 2014-15.

Editor Engagement

By end of December 2013, user-to-user messaging will be fully deployed in production on one or more Wikipedia projects. This release would be available to all user groups, and deployments in additional languages and projects would follow soon after the initial release. By end of July 2014, visible progress will have been made towards Flow-enabled article talk discussions, a workflow language and feed/subscriptions framework, with precise milestones to be determined. However, we don't expect that we will have "Flow" on all talk-based workflows by year-end.

By end of June 2014, we expect to achieve a sustainable increase in the Total Active Editors core metric (registered users across all projects who make ≥ 5 contributions in content namespaces, de-duplicated) by 2.4K per month, adjusting for seasonality and length-of-month.



2013-14 Plan Targets (cont.)

Mobile

By end of June 2014, the number of unique registered users per month who contribute content to the projects from a mobile device (i.e. at least one mainspace edit or upload) will increase to 6K. By the end of June 2014, Wikipedia Zero will serve 35 million page views/month at no charge via Wikipedia Zero partners in the Global South.

Grantmaking

By end of June 2014, we will have distributed up to \$8 million to the Wikimedia movement. Funding to individuals will increase to 7% or more of total grant spending from 4% in 2012-13. Funding to emerging communities and the Global South will increase to 10% or more of total grant spending from 6% in 2012-13. Funding for grants aimed at redressing the gender gap will increase to 1% or more of total grant spending from 0.6% in 2012-13. We will develop and share indicators for organizational effectiveness and growth based on research from within the movement and other volunteer-based movements and sectors.



2013-14 Plan Targets (cont.)

Program Development

By end of October 2013, we will deliver a basic, high-level impact assessment of Wikimedia programmatic activities to Wikimedia grantmakers and people who run programs. This will improve the FDC's ability to make funding decisions and also give chapters and other movement entities indicators about which programmatic initiatives to pursue in the future. By the end of June 2014 we will have delivered a first iteration of in-depth reports on two to three particularly promising programs that are most likely to impact our projects at scale. We will increase Arab world student-editor contributions on the Arabic Wikipedia by 5%. We will lay the foundation for a global education "cooperative" with at least five programs actively participating and sharing best practices in a local cooperative by the end of 2013.



Recap: 2013-14 plan finances & staffing

The 2013-14 plan calls for a 1.6% decrease in revenue from 2013-14 projections, to \$50.1 million. We plan to increase spending from 2012-13 projections of \$38.5 million to \$50.1 million. The reserve is not planned to grow as an additional \$5 million was added to the reserve in fiscal year 2012-13.

Results to date: As of December 31, revenue is at \$34.75 million, \$1.56 million (4%) under plan. Spending is at \$18.78 million, \$3.82 million (17%) under plan. Cash is currently at \$55.3 million, \$1.8 million (3%) ahead of plan.



Recap: 2013-14 plan finances & staffing

"In 2013-14, we plan to grow the staff to a headcount of 192, an increase over 2012-13 of 15%, representing significantly lower staffing growth than in previous years."

Results to date: As of January 31, 2014 our headcount is 167, up 11% from 150 at the beginning of 2013-14.

(At the beginning of 2013-14 the actual WMF headcount was 150, 15 FTEs fewer than the 163 projected in the 2013-14 plan. Since the beginning of 2013-14, we have hired 33 people and 15 have left. This is a turnover rate of 9.8%, which is considered very good.)



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PRODUCT & ENGINEERING



Let's not go into detail on ...

Launched

- OAuth - enables external applications/services to edit, upload, etc.
- Cohort analysis tool: WikiMetrics
- Improvements to site performance and monitoring
- HTTPS by default for logged-in users
- Unsampled mobile pageview data in Hadoop
- Improvements to Education Program software
- Dedicated application for screening Wikimania scholarships
- Completed cross-project launch of notifications without drama

In beta

- New media viewer
- Typography refresh on desktop
- New search backend: ElasticSearch

In progress

- New datacenter selection and Tampa decommissioning
- Prototyping of Wikipedia article translation tool
- Development of new revision storage service for MediaWiki



Key takeaways

- **VisualEditor:** We've released VisualEditor to >120 new Wikipedias as default. We're chipping away at a long tail of requirements that will make VisualEditor a great default editing environment for new and experienced users alike. Once we have those out the door, we'll restart the conversation about default state in wikis where VisualEditor is currently opt-in.
- **Flow:** Well underway and to be deployed to first WikiProjects soon, then potentially opt-in for user talk pages as next big step. This is our "other" *big* project; replacing all talk pages will take some time.
- **Mobile:** We've blown away our original target for mobile contributions due to massive success of editing on mobile, with now >20K users/month completing at least one edit on a mobile device. We're focusing on continued improvements to the editing experience on the mobile web, and will soon launch new native apps with built-in editing support (including experimental anonymous editing).
- **Growth:** The team's been down to one developer (due to internal moves) for most of the current fiscal, but has focused on getting our on-ramping tools (GettingStarted, GuidedTours) deployed across the cluster, and launching the new draft namespace as a safe article incubation area.

VISUAL EDITOR



2013-14 Plan Targets: Visual Editor

	Dec 2013	June 2014
Target	After additional stability improvements and bug fixes, Visual Editor will be deployed as the default editor for most Wikimedia wikis, beyond the July Wikipedia rollout.	Opt-in experimental real-time collaboration and chat will be deployed in production, leading to full build-out in the default mode in FY 2014-15.
Actual/Expected	Delayed Our largest wikis (English, German, Dutch and Spanish Wikipedia) have requested an opt-in configuration, which is in-place. Beyond that, we've continued the default deployment to most remaining Wikipedias, but actual usage is still below expectations, which we attribute to known remaining issues.	Delayed Experimental real-time collaboration not likely as team will continue to be focused on stability, core features and performance. Renewed opt-out deployment on large language Wikipedias possible, but a stretch.

Visual Editor

Last six months were focused on:

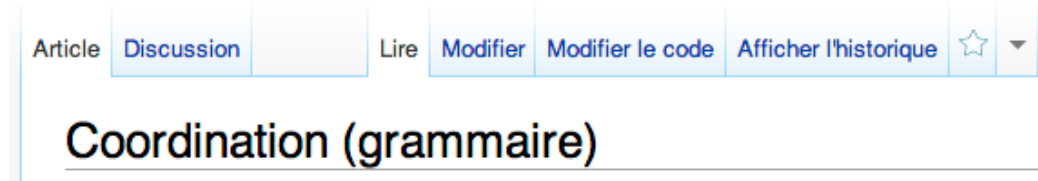
- Opt-out/opt-in discussions, integration with Beta Features
- Continued work on features
- Copy and paste support
- Corruption issues
- Bug fixes
- Performance
- Rollout to additional wikis (mostly Wikipedias)
- UX work for coming features

Plan for next six months:

- [Reference improvement iteration 1: nice default dialogs for books, sites, etc.](#)
- Reference improvement iteration 2: fully URL-driven citations
- Media settings
- HTML comments, hidden content
- Redirects
- Table editing
- Performance
- ...

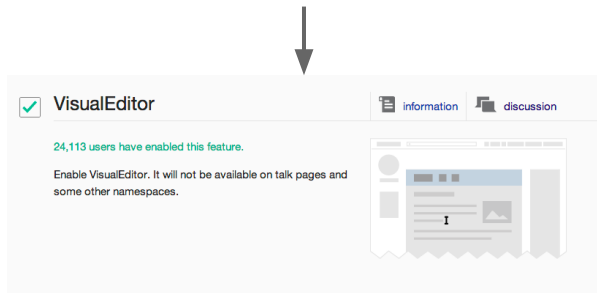
Opt-out vs. opt-in

Opt-out experience: French Wikipedia



Opt-in experience: English Wikipedia

Howief ¹ Talk Preferences Beta Watchlist Contributions Log out



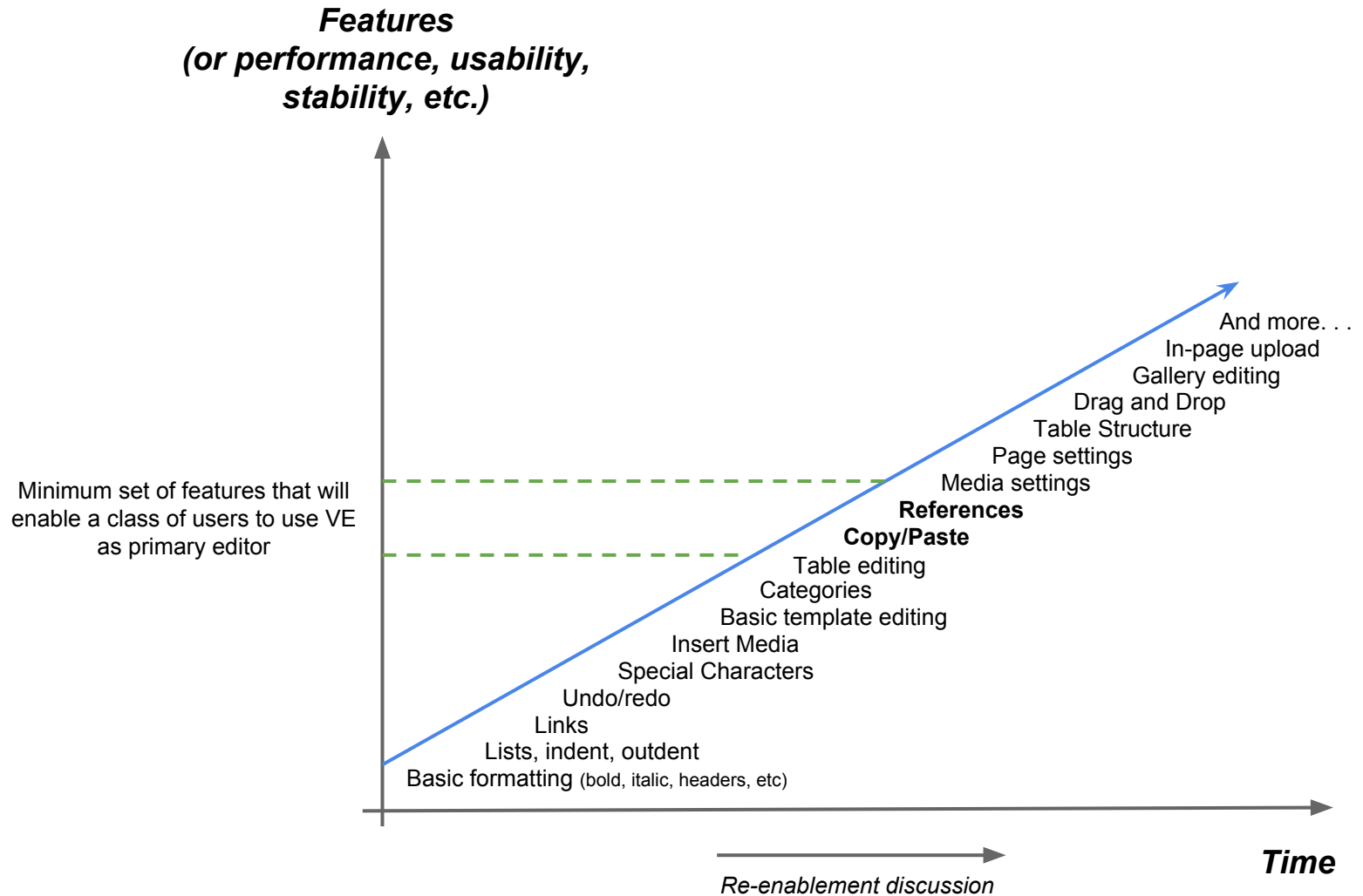


Visual Editor: Deployment Status & Usage

Project (Wikipedias)	Status (as of Jan 30, 2014)	Edits from VE		
		IP users	Newly registered editors	Experienced editors
English	Opt-in (Beta)	0%	<1%	<1%
German	Opt-in (Beta)			
Dutch	Opt-in (Beta)			
Spanish	Opt-out -> Opt-in	33% ru: 25% es: 43%	19% ru: 11% fr:24%	1.8% ru/sv: 1.8% es: 4.5%
French	Opt-out			
Italian	Opt-out			
Russian	Opt-out			
Portuguese	Opt-out			
Swedish	Opt-out			
Japanese	Opt-in (technical issues)			
Others	Opt-out in 150 additional wikis; opt-in in 136 additional wikis	Not available yet		



Conceptual Model: From opt-in to opt-out





What could opt-in -> opt-out look like?

Must	<i>Features:</i> Copy & paste with rich formatting	About 60% done
	<i>Features:</i> Easy-to-use references dialog optimized for common citation templates	About 20% done
	<i>Stability:</i> Basic editing operations work as expected	About 60% done
	<i>Stability:</i> Edit corruption minimized	About 80% done
	<i>Performance:</i> Acceptable edit/save latency	About 40% done. Significantly improved for common cases; large/complex articles still challenging
Should	<i>Features:</i> Table editing, media properties, galleries, hidden comments, page settings, equation editing, upload/media insertion improvements ...	About 20% done
Could	<i>Features:</i> No dependency on wikitext for editing any part of a wiki except templates	About 20% done. Depends on Flow-enabled talk.
Won't	<i>Features:</i> Beautiful interfaces for all parts of the content (e.g. LaTeX, extensions, etc.)	N/A

FLOW



2013-14 Plan Targets: Editor Engagement (Core Features)

	Dec 2013	June 2014
Target	<p>User-to-user messaging will be fully deployed in production on one or more Wikipedia projects.</p> <p>This release would be available to all user groups, and deployments in additional languages and projects would follow soon after the initial release.</p>	<p>Visible progress will have been made towards Flow-enabled article talk discussions, a workflow language and feed/subscriptions framework, with precise milestones to be determined.</p> <p>However, we don't expect that we will have Flow on all talk-based workflows by year-end.</p>
Actual/Expected	<p>Modified</p> <p>We determined that user-to-user messaging was not an ideal initial use case, and focused on production pilots on two WikiProjects instead.</p>	<p>In progress</p> <p>Continued piloting of Flow on select user and article talk pages</p> <p>Full deployment on user and article talk expected in 2014-15, possibly later depending on progress on workflows</p>



Flow: Discussion engine

Last six months were focused on:

- The basics: Topics, posts, replies, table of contents, history, contributions, basic moderation, AbuseFilter integration
- Identifying community champions who are ready to try a new discussion system

Plan for next six months:

Limited pilots:

- Planned:
 - First production releases on two WikiProjects: Breakfast and Hampshire
- Under consideration:
 - User talk opt-in
 - Select Article Talk pages associated with Wikiprojects
 - Pages/projects that would like to pilot, e.g. Wikidata

Features:

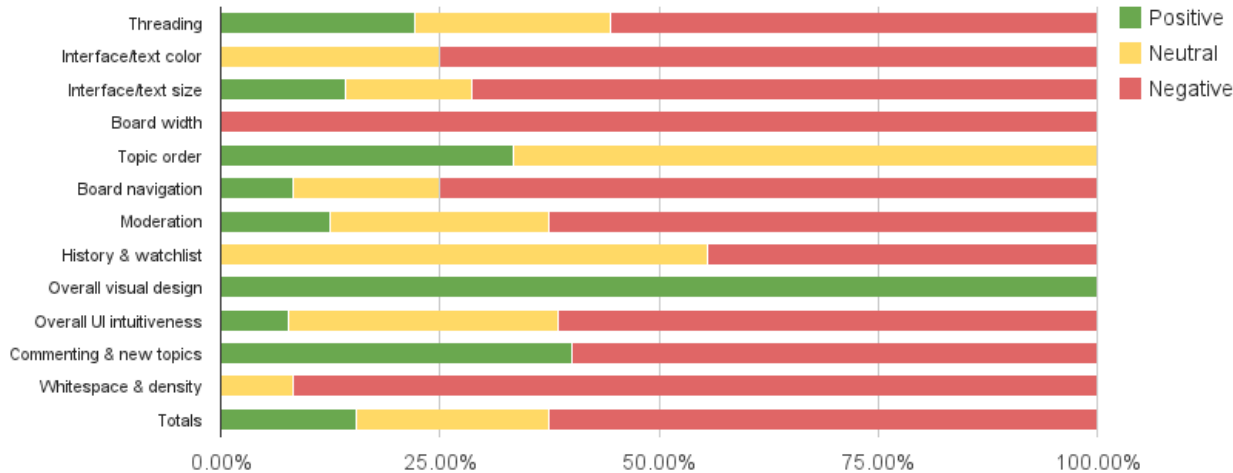
- Largely TBD based on user feedback, but likely to include search, feed, mobile

Flow: User Feedback so far

Feedback on Sandbox release (Nov-Dec 2013)

- **Users who gave feedback:** 28 users from English Wikipedia, German Wikipedia, mediawiki.org, others
- **Average year joined:** 2010
- **Average edit count:** ~20k edits to home wiki

Percent of feedback by sentiment



Most positive

- Visual design
- Topic order
- Starting/replying

Most negative

- Whitespace
- Text density

More debated

- Threading
- Text size
- Overall intuitiveness

User feedback also collected from (separate from above):

- In-person user test at UC Berkeley
- In-office UX workshop (editors and UX professionals)

MOBILE



2013-14 Plan Targets: Mobile

	Dec 2013	June 2014
Target	(No mid-year target)	The number of unique registered users per month who contribute content to the projects from a mobile device (i.e. at least 1 mainspace edit or upload) will increase to 6K.
Actual/Expected	(No mid-year target)	Will significantly exceed Currently, approximately 20k registered users make at least one edit from mobile device

Last six months were focused on:

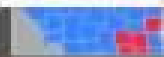
- Mobile web editing
- Web and app photo uploads
- Editing guider/tutorial
- UI Improvements

Plan for next six months:

- Tablets:
 - VisualEditor (from alpha to beta)
 - Tablet-friendly UI: articles, history, watchlist, recent changes, new pages
- Native Wikipedia apps:
 - Reader experience
 - Wikitext editing
 - Microcontributions



bara



U.S. Senator: 2005–2008



Legislation



Committees

Presidential campaigns

2008 presidential campaign



2012 presidential campaign



Decisions

U.S. Senator: 2005–2008

Main article: [United States Senate career of Barack Obama](#)



Obama in his official portrait as a member of the United States Senate

Obama was sworn in as a senator on January 3, 2005,^[1] becoming the only Senate member of the Congressional Black Caucus.^[2] CQ Nexis characterized him as a "loyal Democrat" based on an analysis of all Senate votes in 2005–2007. Obama announced on November 15, 2008, that he would resign his Senate seat on November 16, 2008, before the start of the lame-duck session, to focus on his transition period for the presidency.^[3]

Legislation

See also: [List of bills sponsored by Barack Obama in the United States Senate](#)


Obama cosponsored the [Secure America and Orderly Immigration Act](#),^[4] he introduced two initiatives that bore his name: [Lugar–Obama](#), which expanded the [Nunn–Lugar Cooperative Threat Reduction](#) concept to conventional weapons,^[5] and the [Federal Funding Accountability and Transparency Act of 2006](#), which authorized the establishment of [USA Spending.gov](#), a web search engine on federal spending.^[6] On June 3, 2008, Senator Obama – along with Senators Tom Coburn, Tom Cotton, and John McCain –


Mobile lets us try things faster

Search Wikipedia (Beta)

Sue Gardner

ACTIVITY & CONTRIBUTIONS

 Edited the page [DeviantArt](#), 16 days ago.

 Uploaded 660 days ago.

Thanked by [Anthonyhcole](#) for an edit to [Induction chemotherapy](#).

Joined over 7 years ago with **1,962 edits** and **24 uploads**.
[Visit user page.](#)

[Talk to Sue Gardner](#)

User pages with auto-generated activity profiles (in beta)

Search Wikipedia (Beta)

Last edited 3 hours ago by an anonymous user

Crocodylia

Crocodylians
 Temporal range: [Late Cretaceous](#)—[Holocene](#), 83.5–0Ma

[PreЄ](#) [Є](#) [O](#) [S](#) [D](#) [C](#) [P](#) [T](#) [J](#) [K](#) [PgN](#)



[Saltwater crocodile](#) (*Crocodylus porosus*), (top left) [American alligator](#) (*Alligator mississippiensis*) (right), and [Indian gharial](#) (*Gavialis gangeticus*) (bottom left)





Scientific classification 

Kingdom:	Animalia
Phylum:	Chordata
Class:	Reptilia
Superorder:	Crocodylomorpha

Last modified timestamp at the top, linking to history (in beta)

But hard things are still hard

✕ Editing Jerry Pritikin →

Heading ▾ **B** *I* ↺ ↻     More ▾

Jerry Pritikin is best known for being lifelong [Chicago Cubs](#) the **Bleacher Preacher**.

Early life

[Pritikin](#) became a Cubs fan in 1945 at the age of eight, when the Cubs were in the [World Series](#) and he begged his father to take him to a game. While his father denied the request, he did promise to take Pritikin the next time the Cubs made it to the series (a feat the Cubs have yet to [accomplish](#)).^[1] [Pritikin](#) did start going to Cubs games with his brothers and sisters. In 1960 he moved to San Francisco, where he worked as a photographer, selling his photos to wire services and local newspapers.^[1] He started attending baseball games at [Candlestick Park](#), where he gained notoriety as a Cubs fan. In 1981, he became a paid consultant for a production of *[Bleacher Bums](#)*, coaching the cast on how Chicago Cubs fans acted.^[1]

The Bleacher Preacher

[Pritikin](#) moved back to Chicago in 1985 and began to attend Cubs games at [Wrigley Field](#) regularly. [Pritikin](#) admired the Cubs mascots of the 40s and decided to put together his own mascot, which would later be called the Bleacher Preacher. The Bleacher Preacher became famous around Chicago for his routine.^[2]

Routine

During Cubs games, [Pritikin](#) would sit in the area of Wrigley Field known as the 'Friendly Confines'.^[3] He would attempt to convert fans of opposing teams as the Bleacher Preacher.^[4]

Attire

As the Bleacher Preacher, [Pritikin](#) wore a solar-powered propeller pith helmet. He carried around a [lifesize voodoo doll](#) that would be dressed in the uniforms of various opposing teams. [Pritikin](#) also carried around "The Ten [Cub-andments](#)", a sign fashioned after the [Ten Commandments](#).

VisualEditor on smartphones and tablets, currently in alpha, needs lots of work



How we're looking at mobile contributions

**Mobile as
contributory platform**

How do new and existing editors use mobile devices to edit/contribute?

**Mobile as
acquisition vehicle**

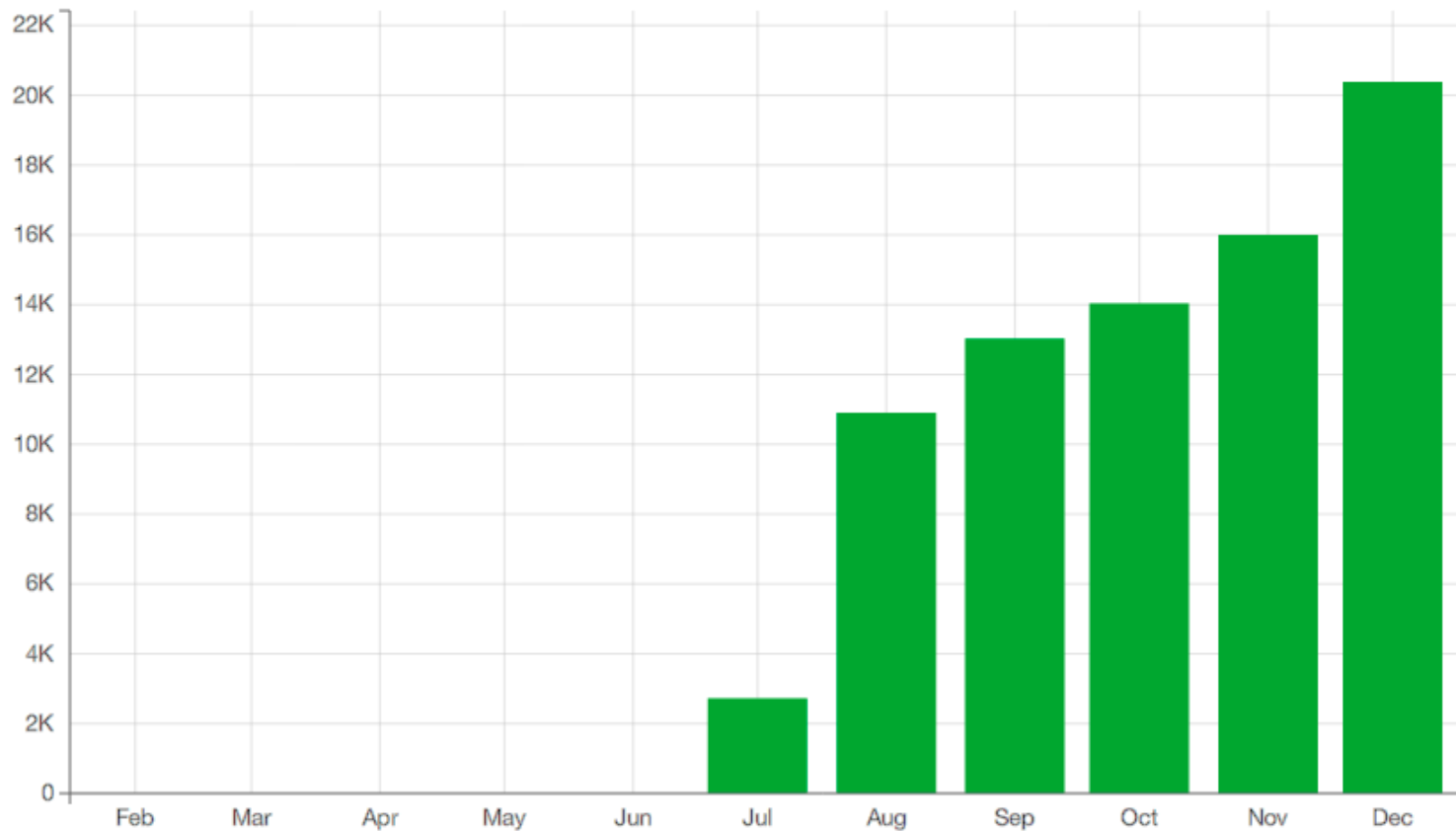
How many new editors does mobile bring to our projects?



Mobile as contributory platform

All projects, users who made 1+ edits on mobile

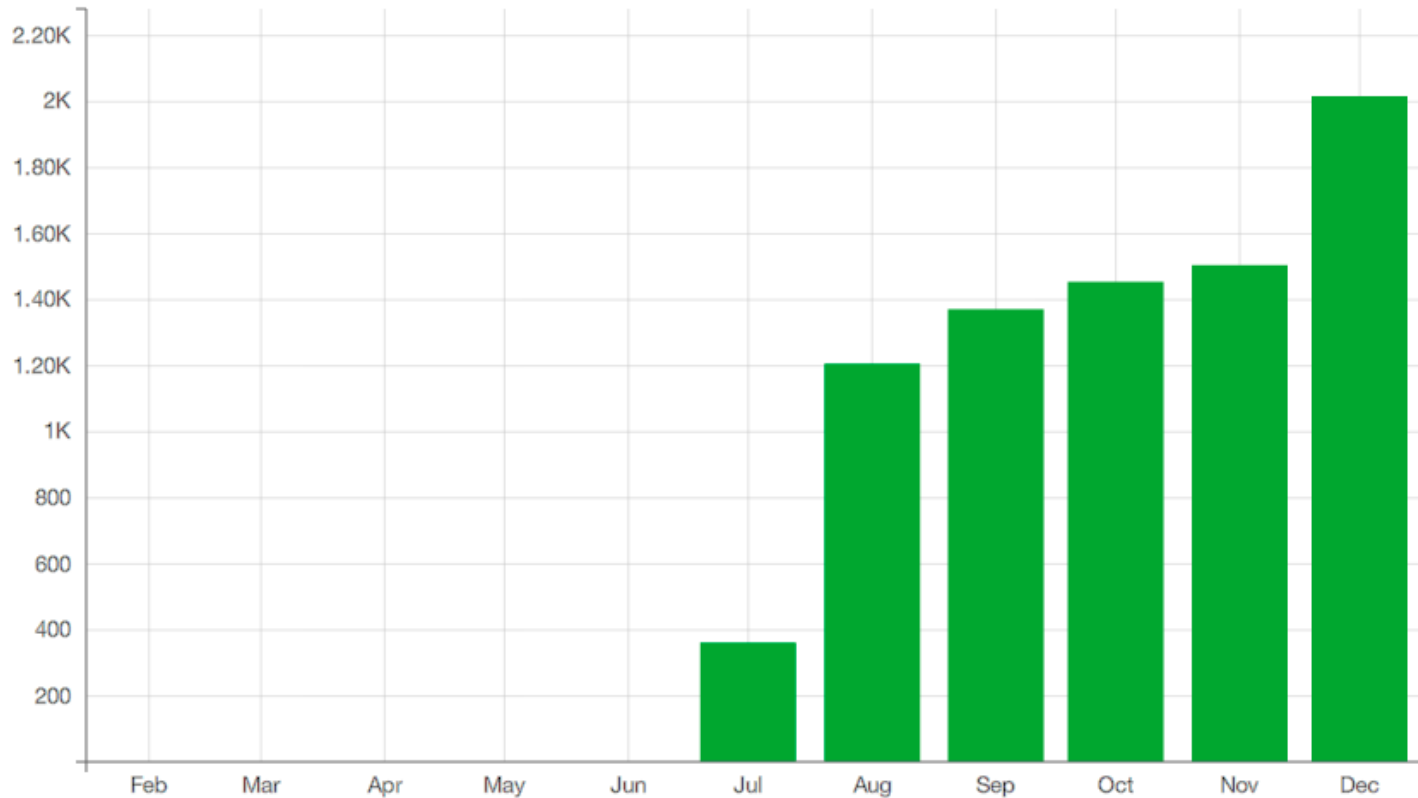
Unique editors (per month)



Mobile as contributory platform

All projects, users who made 5+ edits on mobile

Users who edited 5 or more times on mobile during month

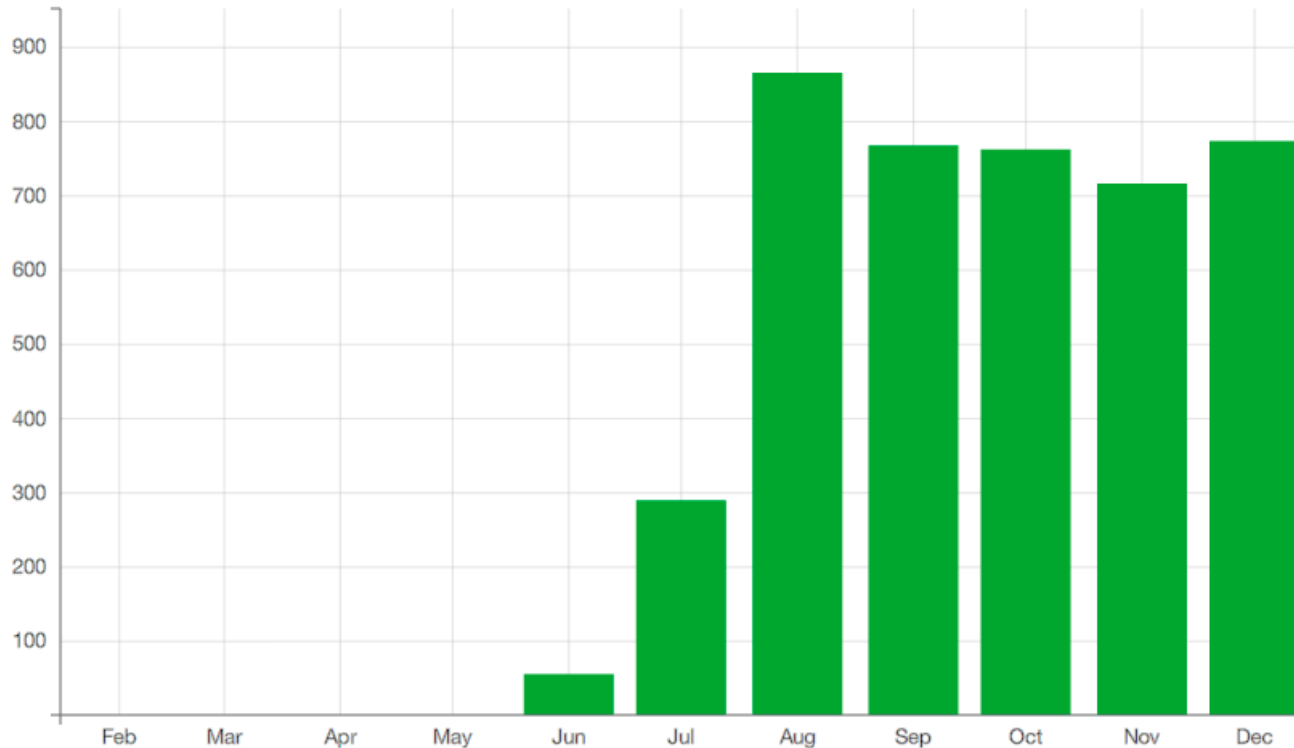




Mobile as an acquisition vehicle

English Wikipedia, signed up on mobile and made 5+ edits anywhere
Context: English Wikipedia has ~30K users who make 5+ edits/month

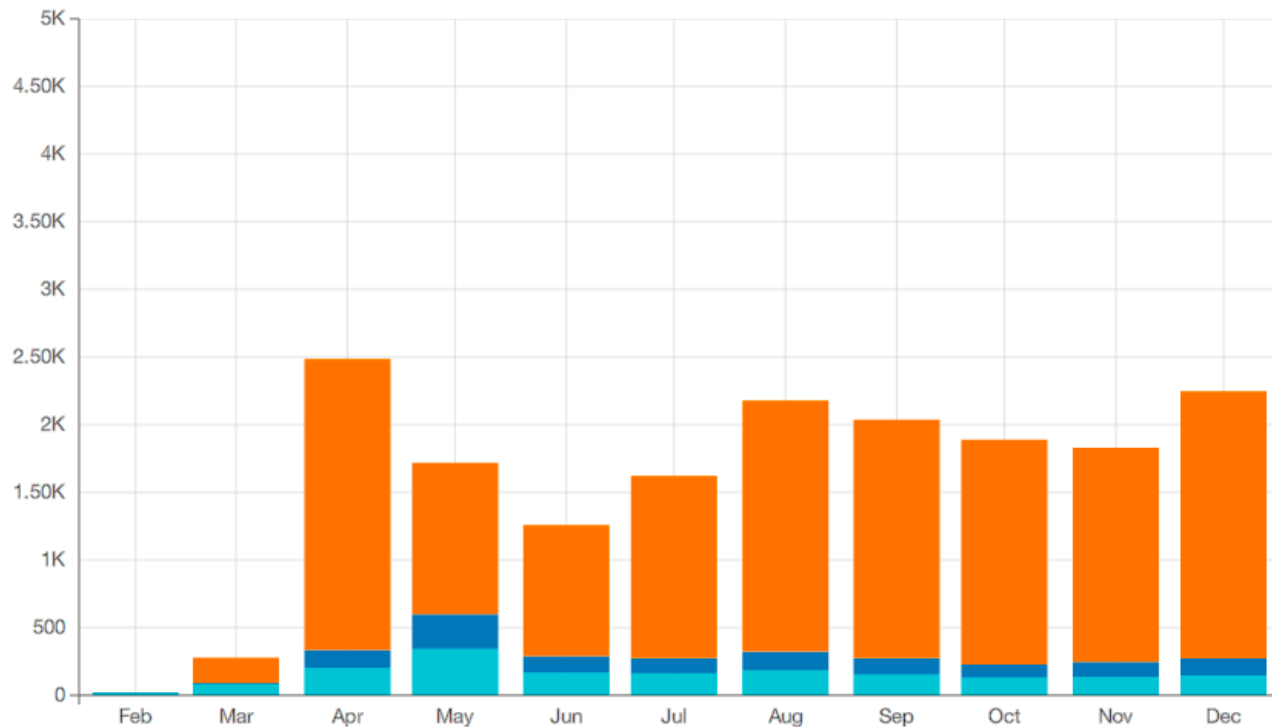
Editors registered on mobile who made 5+ edits on enwiki (mobile+desktop)



Lots of uploaders as well

All projects, users who made at least 1 upload via mobile web or Android/iOS app

Unique uploaders (per month)



Android
iOS
Web

153.00
122.00
1.76K

GROWTH



2013-14 Plan Targets: Editor Engagement (Growth)

	Dec 2013	June 2014
Target	(No mid-year target)	We expect to achieve a sustainable increase in the Total Active Editors core metric (registered users across all projects who make ≥ 5 contributions in content namespaces, de-duplicated) by 2.4K per month, adjusting for seasonality and length-of-month.
Actual/Expected	(No mid-year target)	Possible, but stretch On English Wikipedia, approx. 450 active editors/month came through the GettingStarted funnel (October 2013). Deployment of relevant features continues across languages/projects.



Growth

Last six months were focused on:

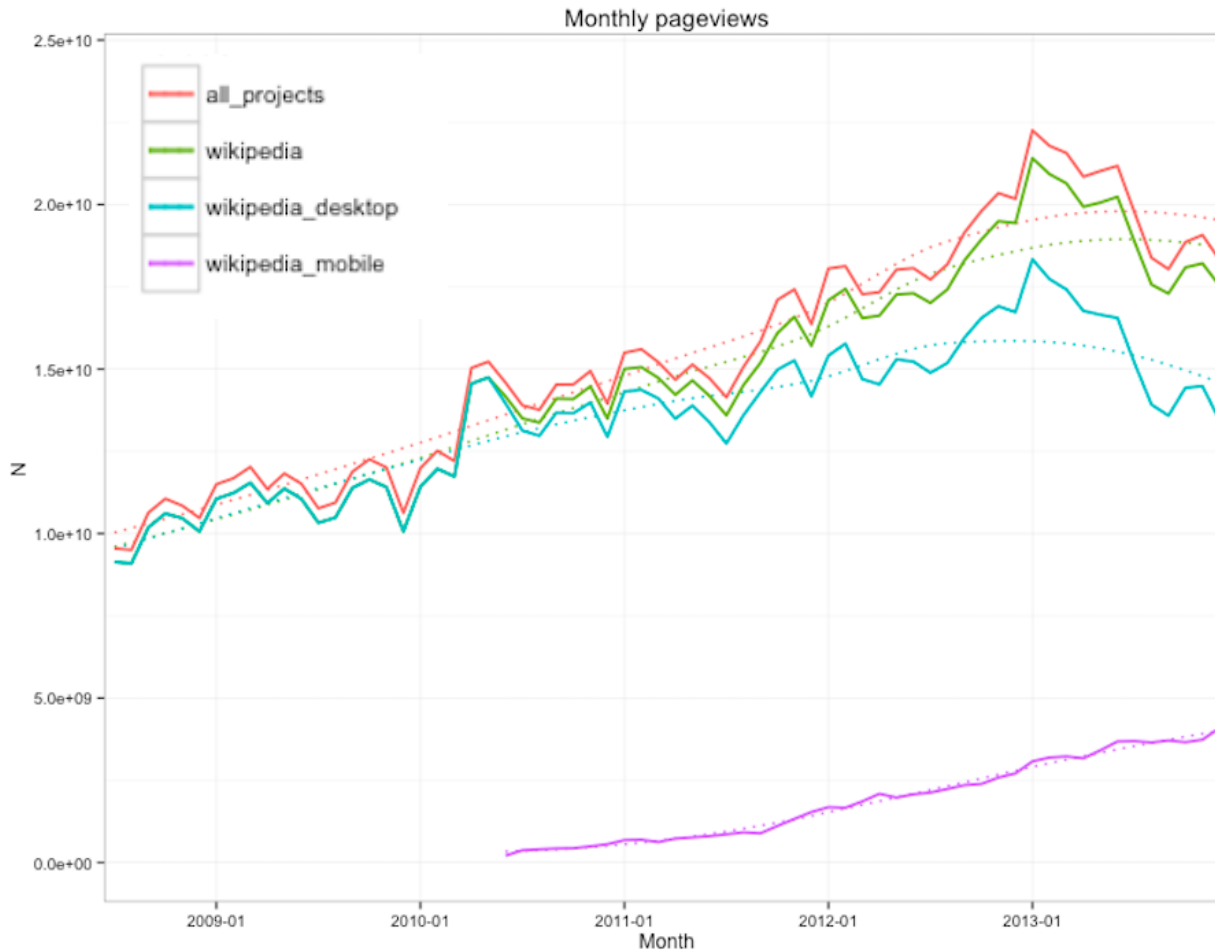
- Finished A/B Testing of Getting Started, productization on enwiki
- GuidedTour released on 10 Wikipedias (27 total)
- Task API for suggestions (using Wikidata)
- Hiring: one new team member added in January (now 2 devs), one more position open

Plan for next 6 months:

- Productize GettingStarted across more languages
- Anon editor conversion
- Draft namespace: improving UI

PAGEVIEWS ANALYSIS

Page Views: Empirical Data



1. Overall PVs down, though not as much as the nominal numbers make them appear (comScore + Internal)
2. Mobile PVs are growing, but not enough to offset decline in desktop
3. Desktop UVs are still growing, suggesting a decline in PV/Unique, though PV/Uniques are within the range of what we've seen historically (comScore)



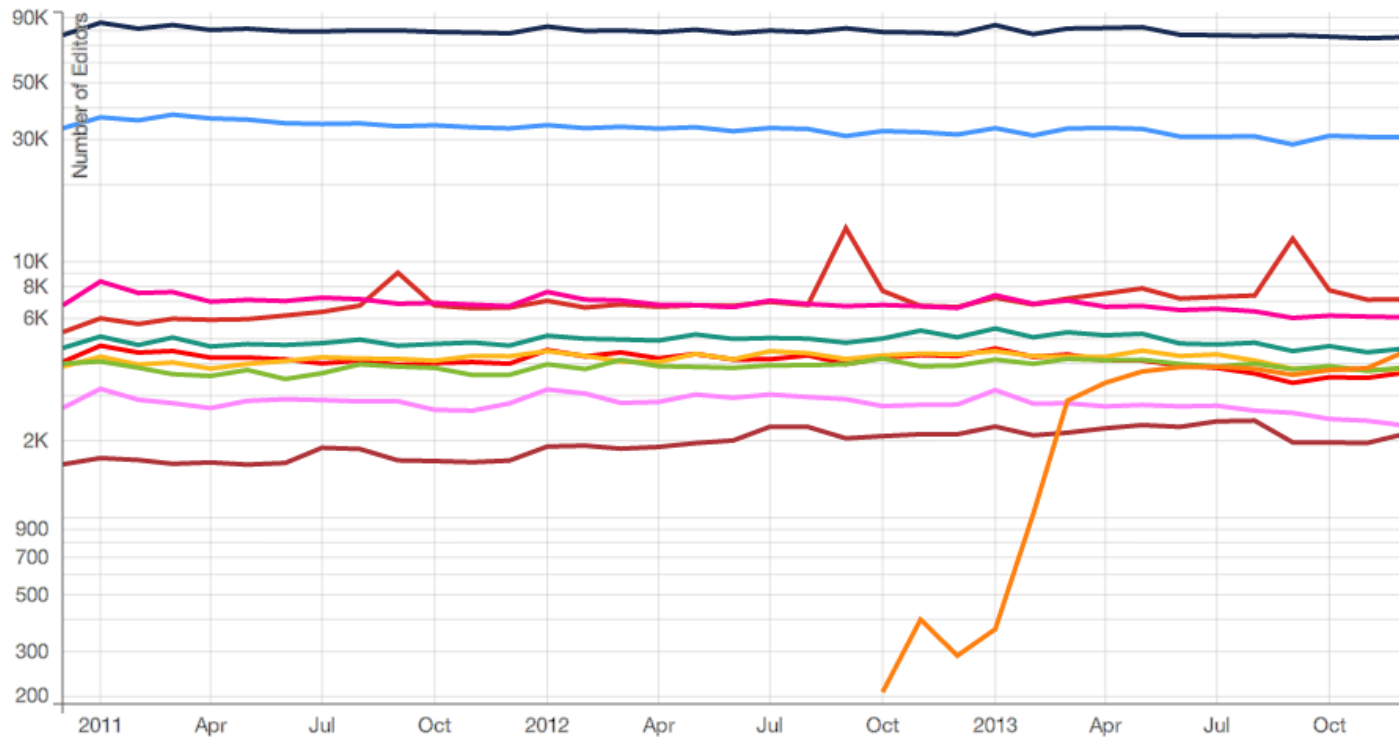
Page Views: Hypotheses

- Shift to mobile web and/or apps
 - At least for us, mobile does not offset drop
- Google Knowledge Graph resulting in change in user behavior
 - Investigation of referral traffic in process
- Other changes in user behavior, e.g. newsfeed as entrypoint
- Performance degradations
- Change in crawler behavior



Total Active Editors Update

Active Wikimedia Editors for All Wikimedia Projects (5+ edits per month)



Flat to single-digit YoY decline. No substantial change from historical trends

WIKIPEDIA ZERO

3

million page views



go / kill decision



go / kill decision

ENGINEERING



- ▶ Core codebase is stable
- ▶ IP whitelisting is working
- ▶ Opera configuration is working
- ▶ Client data is removed from codebase

TEAM



Wikipedia Zero offsite retreat, January 2014

- ▶ Strong hires on key positions
- ▶ Better cross-departmental coordination
- ▶ Improved team dynamics

3

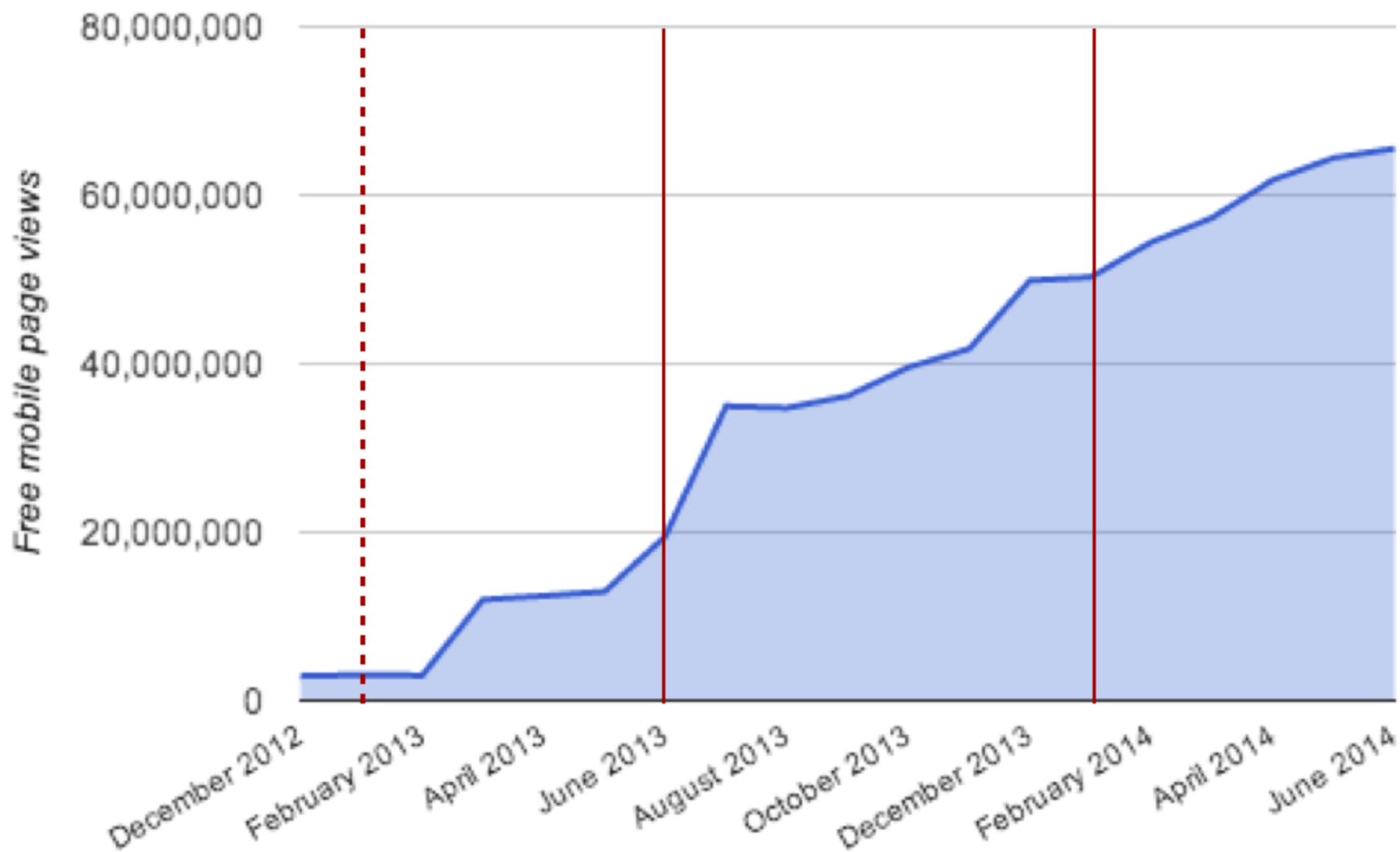
million page views

50

million page views







GRANTMAKING



Grantmaking:

supports the movement across multiple dimensions





2013-14 Plan Targets: G&PD

structures * impact * diversity

From 2013-14 Annual Plan:

“By end of June 2014, we will have distributed up to \$8 million to the Wikimedia movement. Funding to individuals will increase to 7% or more of total grant spending from 4% in 2012-13. Funding to emerging communities and the Global South will increase to 10% or more of total grant spending from 6% in 2012-13. Funding for grants aimed at redressing the gender gap will increase to 1% or more of total grant spending from 0.6% in 2012-13. We will develop and share indicators for organizational effectiveness and growth based on research from within the movement and other volunteer-based movements and sectors.”



Grantmaking: 2013-14 Year to Date focus areas

Structures
Systems
Processes



apply
for a grant



review
open proposals



engage
current grants

Learning

Six account limit



Problem:

You are going to give a workshop on how to edit Wikimedia projects or going to get students in a school or university to edit for the first time. No more than 6 people will be able to create their own accounts from the same IP.

Solution: The solution avoids people being unable to create accounts - and hence frustrated! - and saves a large amount of time spent in trying to solve the problem during the activity.

endorsed by: [Ocastro](#)

Mentoring



IdeaLab



Diversity





Grantmaking: four primary avenues for funds distribution

TRAVEL AND PARTICIPATION SUPPORT

Travel funding to participate in mission-aligned events.

INDIVIDUAL ENGAGEMENT GRANTS

Provide comprehensive support for individual and small teams focused on making online impact.

PROJECT AND EVENT GRANTS

Cover expenses related to putting on events and running projects. For individuals, groups and organizations.

ANNUAL PLAN GRANTS

Funding the annual budgets and mission objectives of affiliated organizations.

Source: <https://meta.wikimedia.org/wiki/Grants:Start>

Note: In addition, we offer **Wikimania Scholarships** once per year (\$150,000; recommended by 9 members of the Wikimania Scholarship Committee) as well as strategic **partnership grants** (\$720,000; India and Brazil)



Grantmaking structures: 2013-14 Annual Plan Targets

Total grants budget: \$8.1M

YTD grants spend: \$6.2M

Total # grants: 80

*All figures
FY2013-14 YTD*

**Travel &
Participation
Support**

**Individual
Engagement Grants**

**Project & Event
Grants**

**Annual Plan Grants
(FDC process)**

	Travel & Participation Support	Individual Engagement Grants	Project & Event Grants	Annual Plan Grants (FDC process)
Overview	Individual travel to represent Wikimedia at events	Individuals or small groups to lead experimental work online and offline	Primarily groups, and organizations running specific projects or hosting events	Organizations receiving unrestricted annual funds
Budget	\$50,000	\$200,000	\$700,000	\$6,000,000
YTD	\$7,678	\$99,960	\$511,763	\$4,432,000
Medians	\$653	\$7,865	\$9,860	\$276,000
Range	\$105-\$1,563	\$2,250-\$30,000	\$420-\$147,570	\$53,000-\$1,750,000
# grants	18	10	39	11
Committee	3	17	28	9



Grantmaking Learning and Evaluation: what we have done so far

- Organizational effectiveness indicators (*ongoing*)
- Grantmaking benchmark indicators (*ongoing*)
- Site Visits (WMSE, WMNL, WMAT, WMCH, WMUK)

Organizational effectiveness

- Movement organization database: entity growth and projections
- Network mapping, global south communities (Gephi)
- Geo location services (*ongoing*)

Community mapping and baselines

Systems for learning and evaluation

- The Evaluation portal
- Learning Patterns
- Wikimetrics
- Learning modules
- Redesigned Grants portal; redesigned proposal/report forms (*ongoing*)
- IRCs, Hangouts, Wikimania booth, Learning Day
- Incorporating Fluxx grants system (*ongoing*)

Internal Learning / Processes

- Quarterly metrics
- Input surveys designed for PEG, AP/FDC, and IEG programs: post-decision, post-grant
- Travel and Participation Support overview analysis (2011-13)
- IEG Round 1 Impact assessment
- FDC Program Annual Review (2012-13)
- PEG historic impact assessment and scorecard development (*ongoing*)



Grantmaking Learning and Evaluation: Organizational Effectiveness Targets

From 2013-14 Annual Plan:

“We will develop and share indicators for organizational effectiveness and growth based on research from within the movement and other volunteer-based movements and sectors.”

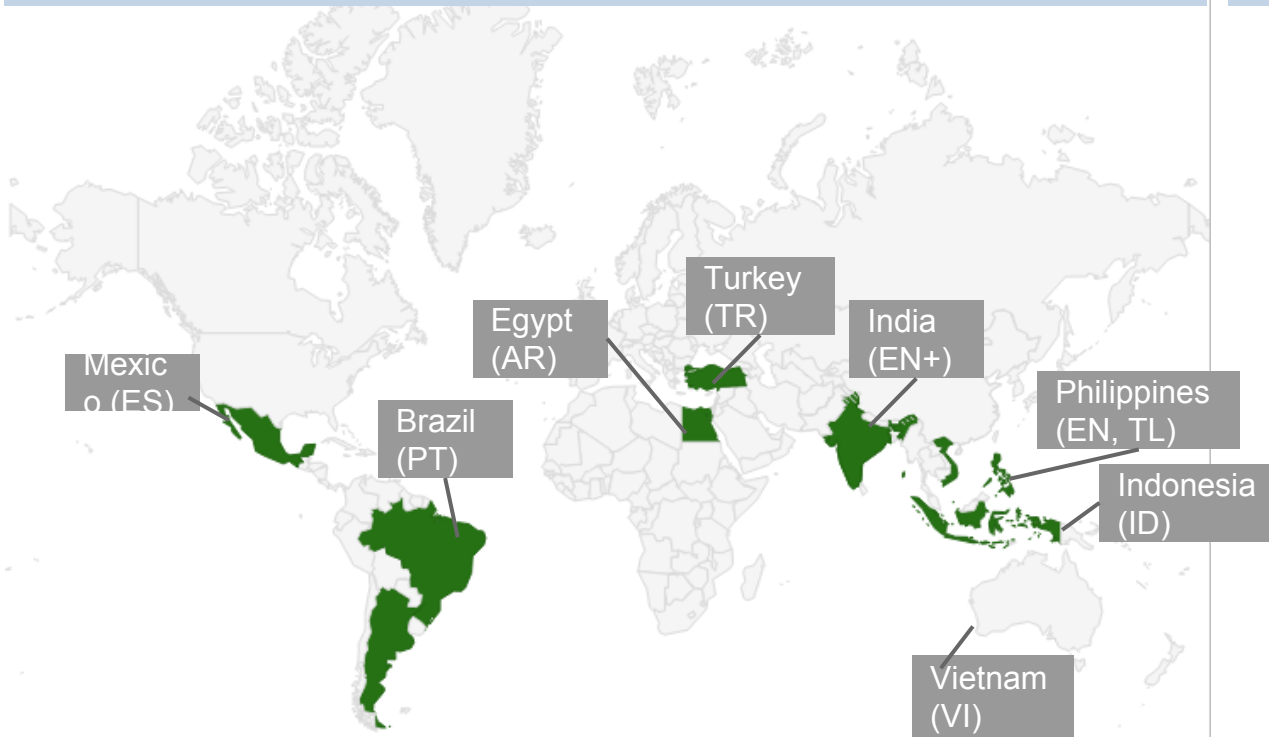
Progress against targets:

- Developed **movement organizations database**, with initial growth rates
- Created framework for monitoring organizational growth as support for FDC (“Guardrails”), tracking growth metrics (see [“APG Financial Overview”](#) example)
- Hiring an **Organizational Learning Coordinator**
- Conducting **primary research** around organizational effectiveness and design with target organizations (with TCC consulting firm)
- Gathering **secondary research** on org effectiveness and grantmaking measures for volunteer based organizations and networks/movements (with TCC consulting firm)



Movement Diversity: 2013-14 progress

Global South Strategy



Preliminary Gender Gap Conversations



**November 9 - 10, 2013
Berlin**





Grantmaking diversity: 2013-14 Annual Plan Targets

Global South: \$1,221,000

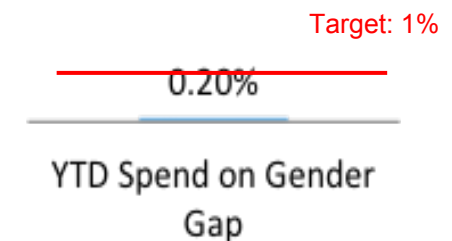
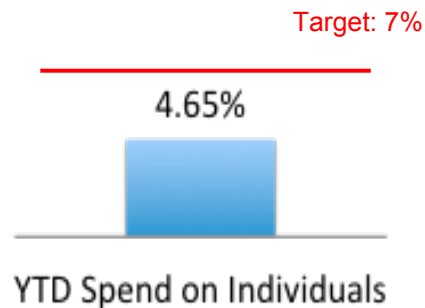
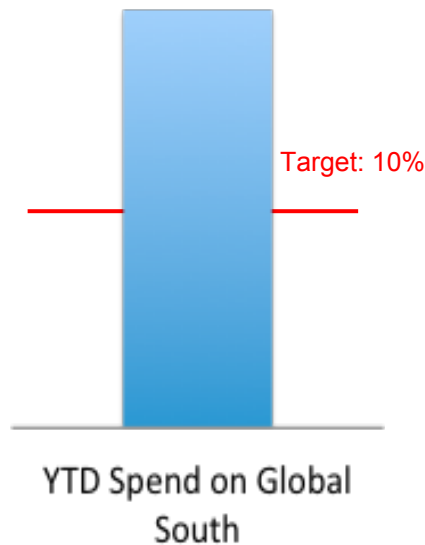
Individuals: \$279,000

Gender Gap: \$12,000

**% of total grants spend
to Global South work**
20.12%

**% of total grants spend
to Individuals**

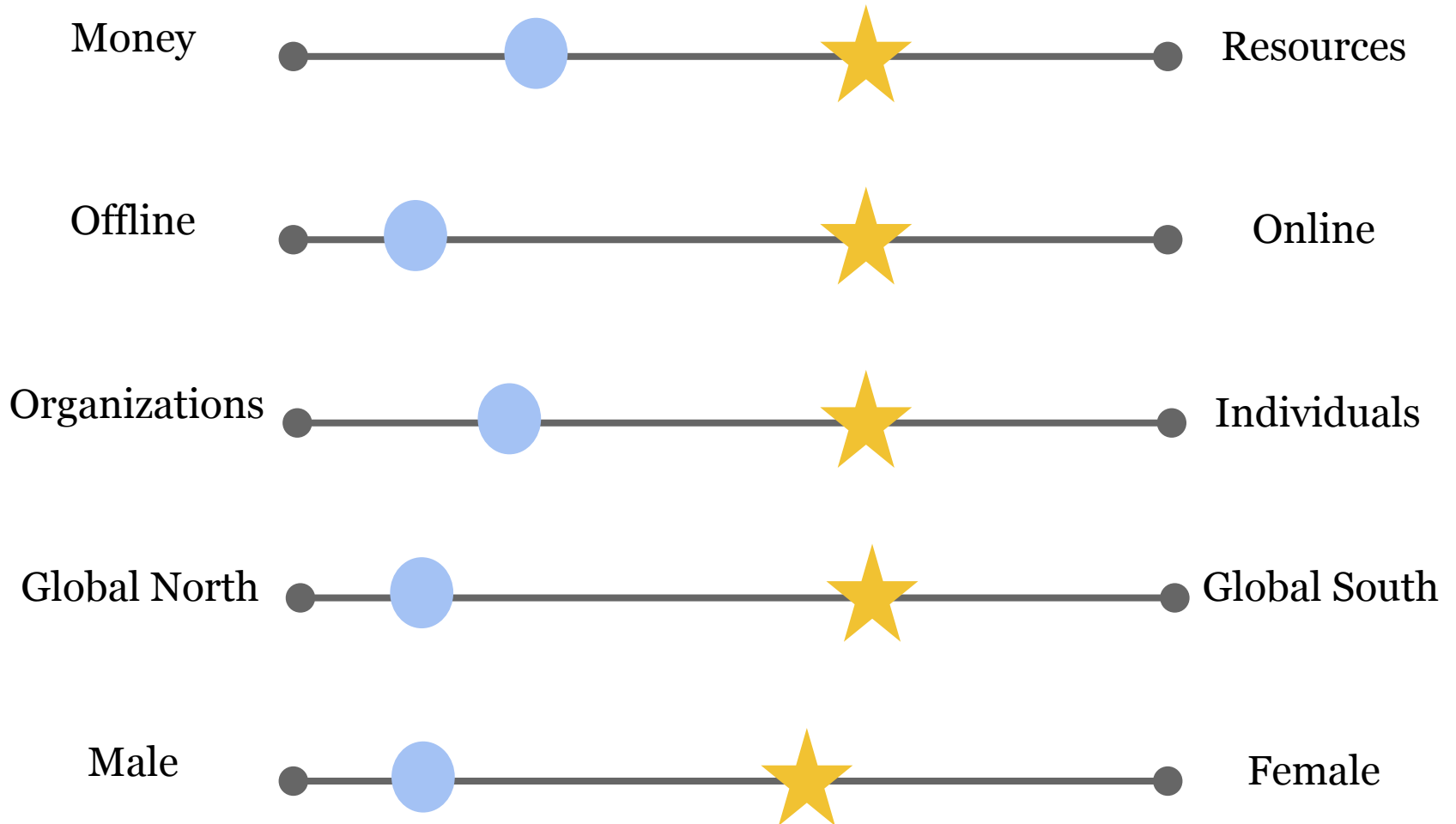
**% of total grants spend
to Gender Gap work**





Grantmaking: Priorities going forward

● Where we are now
★ Where we are going



PROGRAM EVALUATION



2013-14 Plan Targets: G&PD

"By end of October 2013, we will deliver a basic, high-level impact assessment of Wikimedia programmatic activities to Wikimedia grantmakers and people who run programs. This will improve the FDC's ability to make funding decisions and also give chapters and other movement entities indicators about which programmatic initiatives to pursue in the future. By the end of June 2014 we will have delivered a first iteration of in-depth reports on two to three particularly promising programs that are most likely to impact our projects at scale. We will increase Arab world student-editor contributions on the Arabic Wikipedia by 5%. We will lay the foundation for a global education "cooperative" with at least five programs actively participating and sharing best practices in a local cooperative by the end of 2013."

CAPACITY AND COMMUNITY BUILDING



Program Evaluation and Design workshop, Budapest, June 2013

- ▶ Started building a community around evaluation and program design
- ▶ Created online training modules
- ▶ Held online training sessions on Google Hangout

TOOLS & INFRASTRUCTURE

The screenshot shows the WikiMetrics web interface. At the top, there's a navigation bar with 'Wiki Metrics', 'Cohorts', 'Metrics', 'Reports', and 'Support'. Below that, a header says 'Create Analysis Report'. The main content area is divided into two sections: 'Pick Cohorts' and 'Pick Metrics'. In the 'Pick Cohorts' section, there's a search bar with 'upload a new cohort' and 'type and press enter to filter' buttons. A checkbox is checked for 'San Francisco WikiWomens Edit-a-thon'. The 'Pick Metrics' section has a sidebar with 'Bytes Added', 'Edits', 'Pages Created', 'Survival', and 'Threshold'. The 'Bytes Added' section is active, showing a checkbox for 'Compute different aggregations of the bytes contributed or removed from a mediawiki project'. Below this are fields for 'Start Date' (2013-10-17 00:00:00), 'End Date' (2013-11-16 00:00:00), 'Time Series by' (none), and 'Namespaces' (0). A note explains that namespaces refer to the division of pages by namespace in wiki projects, with examples: German Wikipedia Namespaces, Wikimedia Commons Namespaces, and English Wikipedia Namespaces.

Wiki Metrics interface as of late 2013

- ▶ Worked closely with Analytics team on Wiki Metrics
- ▶ Built evaluation portal in close cooperation with Grantmaking team
- ▶ Provided chapters with access to online survey software

Wikipedia editing
workshops

Edit-a-thons

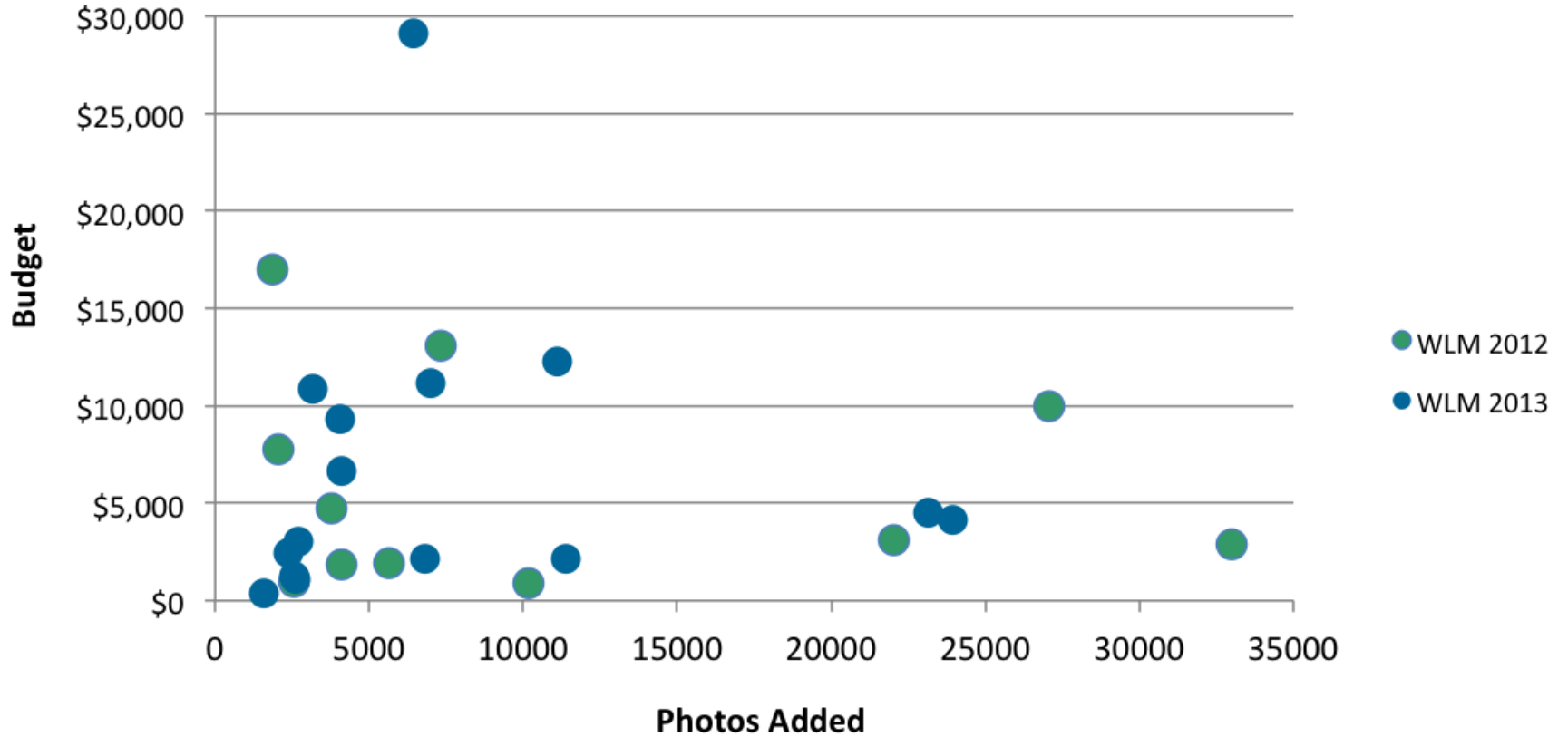
Writing contests

GLAM content partnerships

Wiki Loves Monuments

Other photo upload initiatives

Wiki Loves Monuments Budget and Photos Added

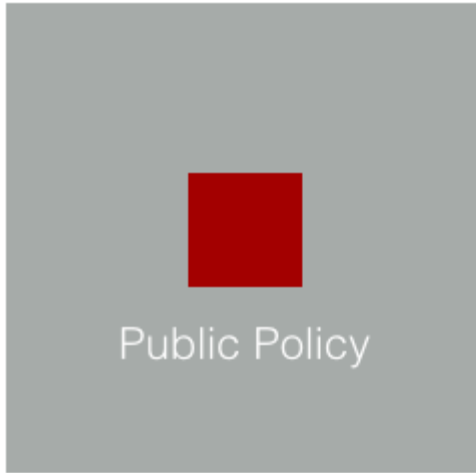


EDUCATION PROGRAM

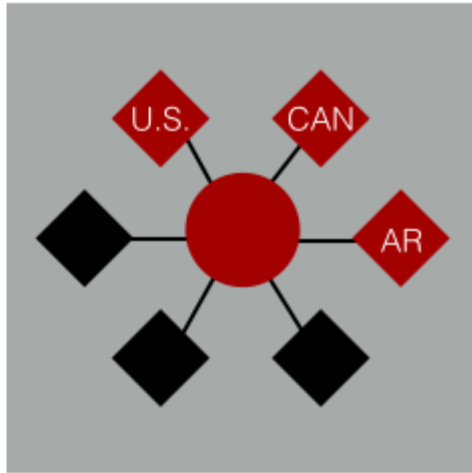


Public Policy

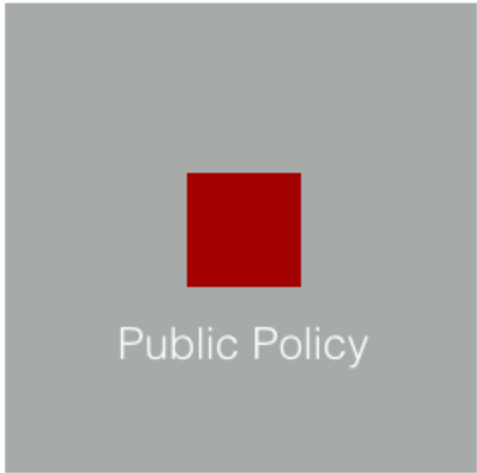




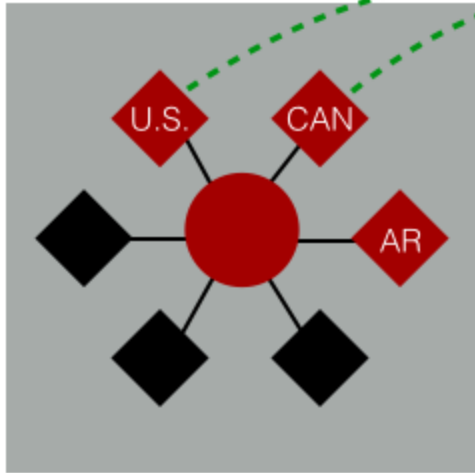
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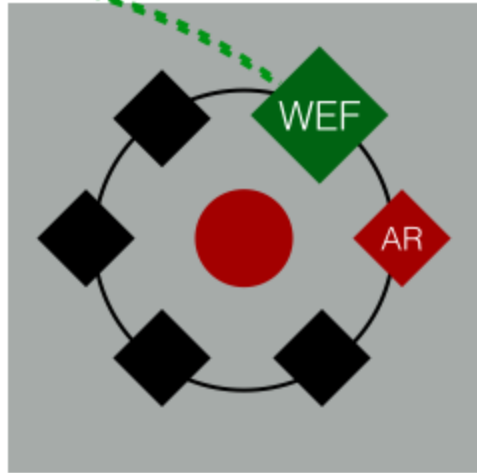
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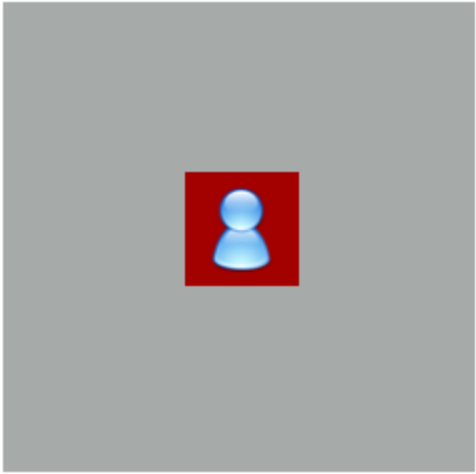
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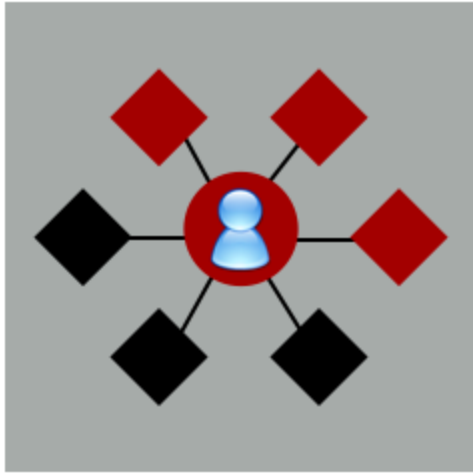
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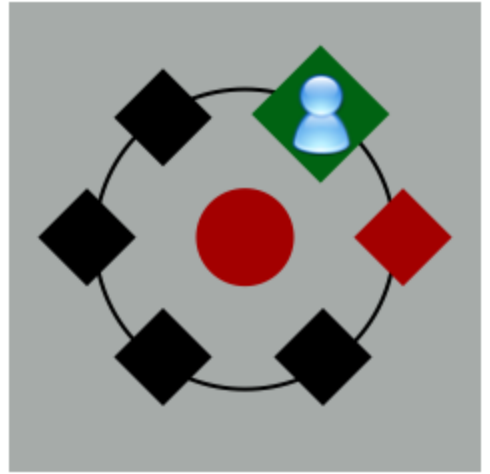
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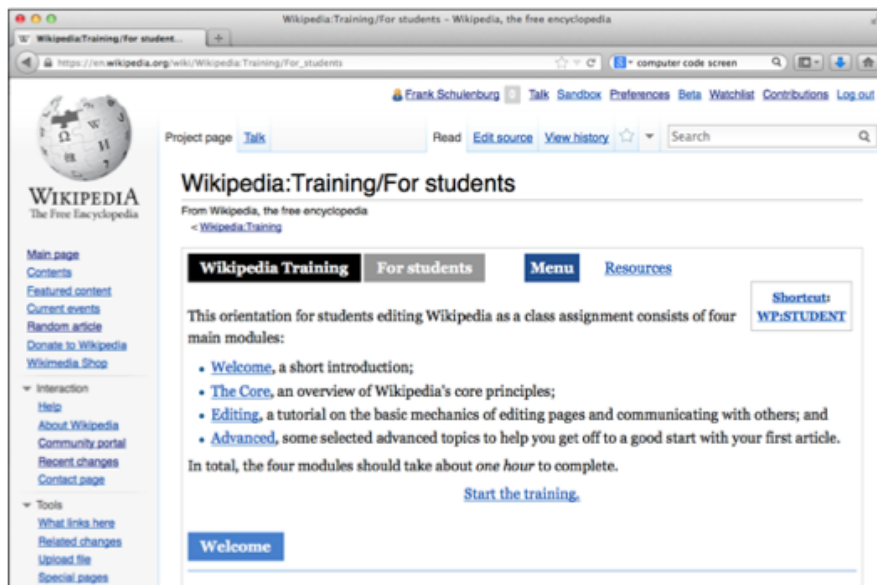
INFRASTRUCTURE AND SUPPORT



Cover page of the new *Editing Wikipedia* brochure published in January 2014

- ▶ Rolled out Mediawiki Education extension on 11 language versions
- ▶ Released three new brochures for first-time contributors

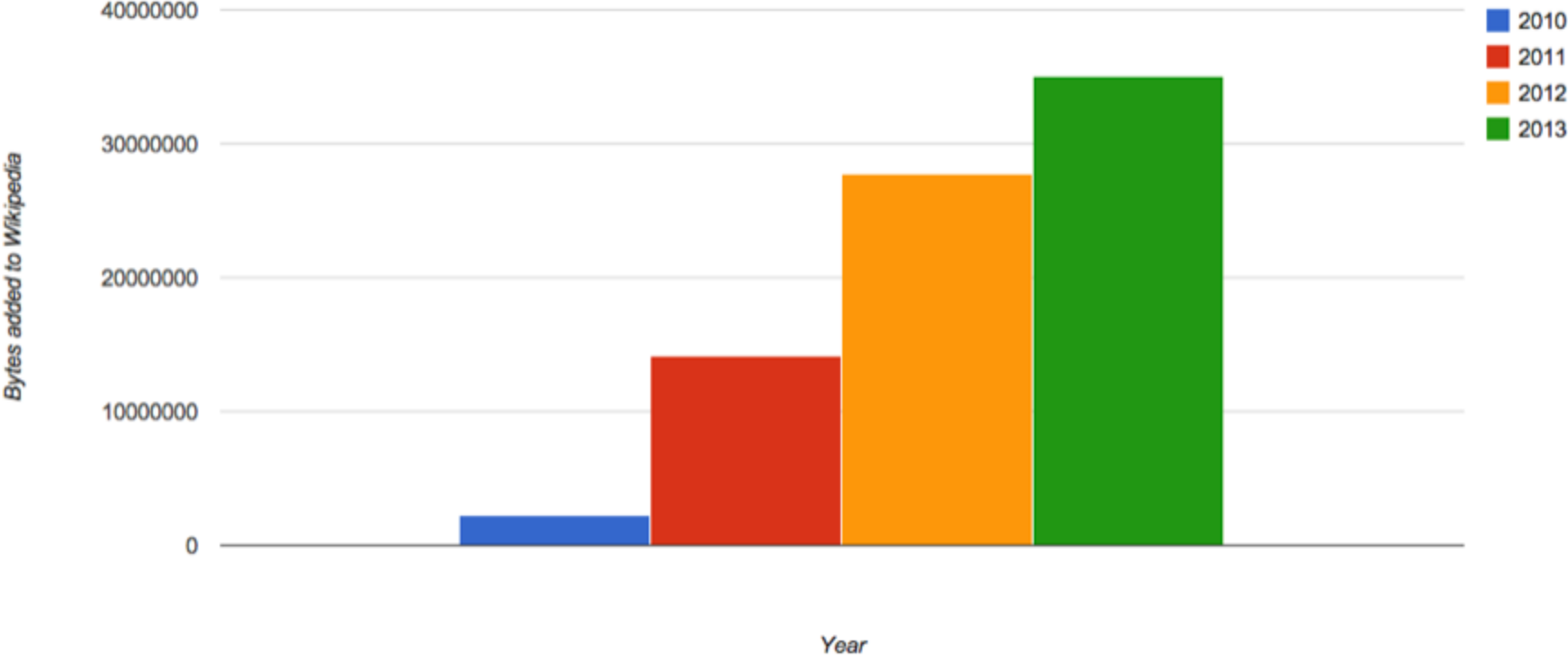
SCALABILITY AND SUSTAINABILITY



Screenshot of the Wikipedia online training for students

- ▶ Successfully rolled out online training for students
- ▶ Prepared launch of the new Education Program Cooperative (11 chapters committed to participate)

Wikipedia Education Program Student Contributions



7,000+

students introduced to Wikipedia editing (total)

36,600

printed pages of content growth on the English Wikipedia

88%

content improvement



Thank you

the past five and a half years have been incredible



Agenda

1. RECAP 2013-14 TARGETS (Sue: 20 minutes)
2. 2013-14 SIX-MONTH ACTUALS (Erik, Frank, Anasuya: 120 minutes)
3. **LESSONS LEARNED THUS FAR (Sue: 30 minutes)**
4. QUESTIONS/DISCUSSION (All: 30 minutes)



KEEP

- Continue evolving the WMF to organize around product and engineering, with a secondary emphasis on grantmaking and program evaluation
- Continue modernization of the user experience, particularly VisualEditor, Flow, Mobile Contributions
- Continue ongoing cycle of reporting & assessment: monthly reports, quarterly reviews, etc.
- Wikipedia Zero is succeeding now!
- Continue working with chapters: site visits, grantmaking, program evaluation



KEEP

- Continue rebalancing grantmaking towards editors and the Global South
- Continue encouraging Wikimedians to try flexible models for self-organization, particularly user groups
- Continue fundraising globally & with a global team, flatly through the year, with continued emphasis on the many-small-donors model
- Continue WMF governance development
- Continue defending WMF and the projects, including against global litigation, trademark abuse, censorship; continue defending the projects' integrity (WikiPR)



STOP

- Over-focusing on a small number of loud voices, at the expense of the community as a whole
- Over-extending ourselves (Board & staff) beyond what's doable
- Funding continued growth of movement entities whose programmatic work isn't achieving sufficient impact
- Waterfall-type long-term planning for the WMF: instead, we should focus on strategy that iterates
- Wasting time & resources accommodating perception issues with no basis in reality (e.g., inaccurate characterizations of COI)



START

- Incorporating community engagement earlier, and strategically, in the product development cycle and in engineering work (from beginning to end of a project)
- Directly and scalably supporting editors/contributors through grantmaking (e.g. Wikipedia Library) https://meta.wikimedia.org/wiki/Grants:IEG/The_Wikipedia_Library
- Continually adjusting requirements for grantees with the goal of making them light and flexible and user-friendly: we need to balance out that strain of Wikimedia culture that tends towards craft and detail and distrust and conservatism



START

- Developing clearer general understanding of Board member roles-and-responsibilities (e.g., as committee liaisons and/or chairs, with community, with staff, etc.)
- Developing a better, more mission- and impact-focused review process for recognition of new organizations by the WMF with AffCom
- Developing a vision and strategy for Movement Roles: particularly, how Wikimedians can self-organize for maximum impact, and how different types of self-organized groups can best intersect and complement each other



NOTE

- We've noted a couple of times in recent meetings that we're not really doing grantmaking. (The structural relationship is not grantmaker>grantee: it is independent and interdependent partners, with the WMF also playing an oversight role and an organizational development role.)



Agenda

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