

# **FDC Round 1 2013-14 Process Survey Results**

“The goal of the FDC is to make decisions about how to effectively allocate movement funds to achieve Wikimedia’s mission, vision and strategy.”

# 2013-14 FDC Round 1 Survey Results

## Summary:

Entities were less satisfied with the FDC process than other stakeholders. This may be due to an overall decrease in average percentage of budget requests approved, misunderstandings about growth rates, and lack of clarity about FDC decision making process.

In this cycle, entities spent less time on the FDC process and reported being less satisfied than in the past. WMF staff and FDC members reported spending more time and being more satisfied with the process than in the past.

Entities feel the process is less reasonable and achievable than in the past, especially for smaller or less experienced groups.

Many entities perceive the FDC process as most effective for institutionalization, and less useful for encouraging innovation.

More communication with FDC and WMF staff is desired.

Entities are struggling less with the portal/process than in the past, but finding more challenges with developing SMART goals and measuring impact. WMF staff still see room for improvement in the portal.

Q: Overall, how satisfied were you with the recent Annual Plan Grant/FDC process?

% of respondents



## Across the board, participants are spending more time on the FDC process, with a drop in satisfaction that time was well spent.

Average time spent by survey respondents was **96 hours**, 46% of whom felt this was too much, and 46% felt it was about right and 6% felt it was too little time.

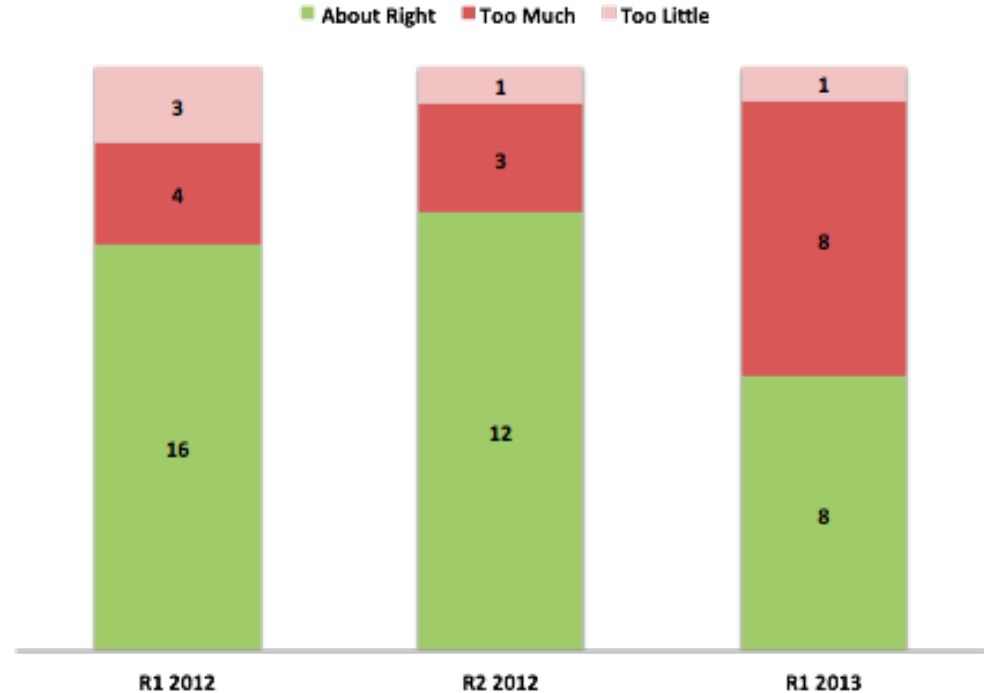
Notably, entities are spending less time on the application but feel increasingly that they have devoted too much time to the process.

In 2012-13 R1 entities spent an average of 68 hours preparing their application. **The median number hours spent by entities in 2013-14 R1 was 50.**

In this round 36% applicants felt time spent was about right, while 63% felt it was too much.

*(Range: 10-480 hours; Median: 50 hours)*

### Amount of time spent on FDC application



## The FDC increased overall spending over 2012-13 R1, but decreased the average award size.

In this round the FDC reviewed applications from a total of 11 compliant entities (up from 9 compliant entities in 2012-13 R1) 3 of whom were first time applicants.

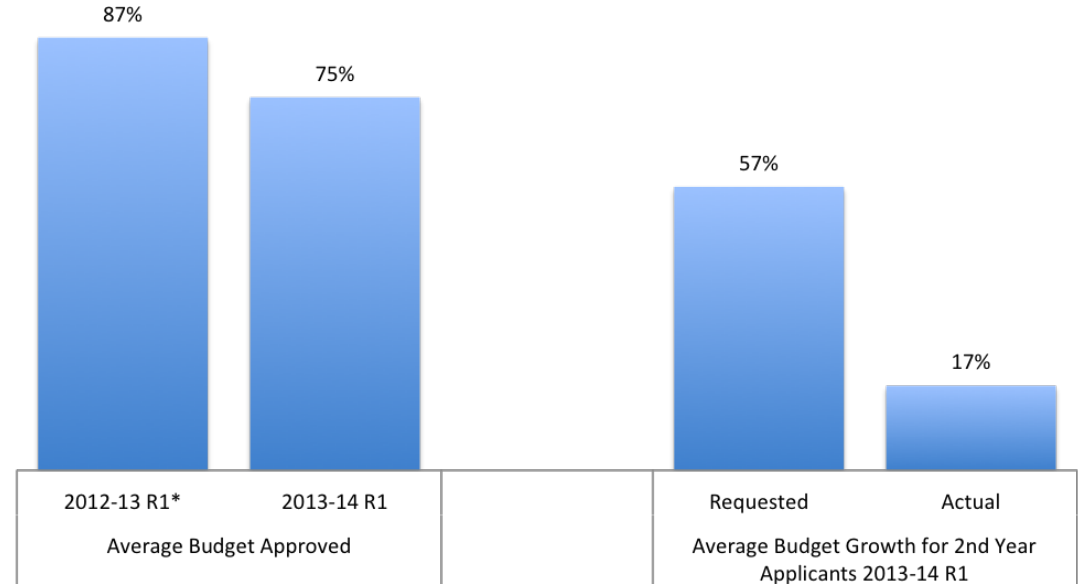
**The FDC awarded funds to all 11 entities, approving amounts ranging from \$53,000 to \$1,750,000, granting a total of \$4,432,000 to entities.**

On average, the FDC approved 12% less of proposed budgets from each entity than 2012-13 R1.

In part, this decrease is due to returning entities requests for an average budget increase of 57%, far exceeding the 20% growth rate guardrail set out in the annual plan grant funding framework.

**Overall, the FDC increased spending on Annual Plan Grants by 12% with 2nd year applicants receiving an average 17% budget increase.**

### Change in Requested and Actual Budgets

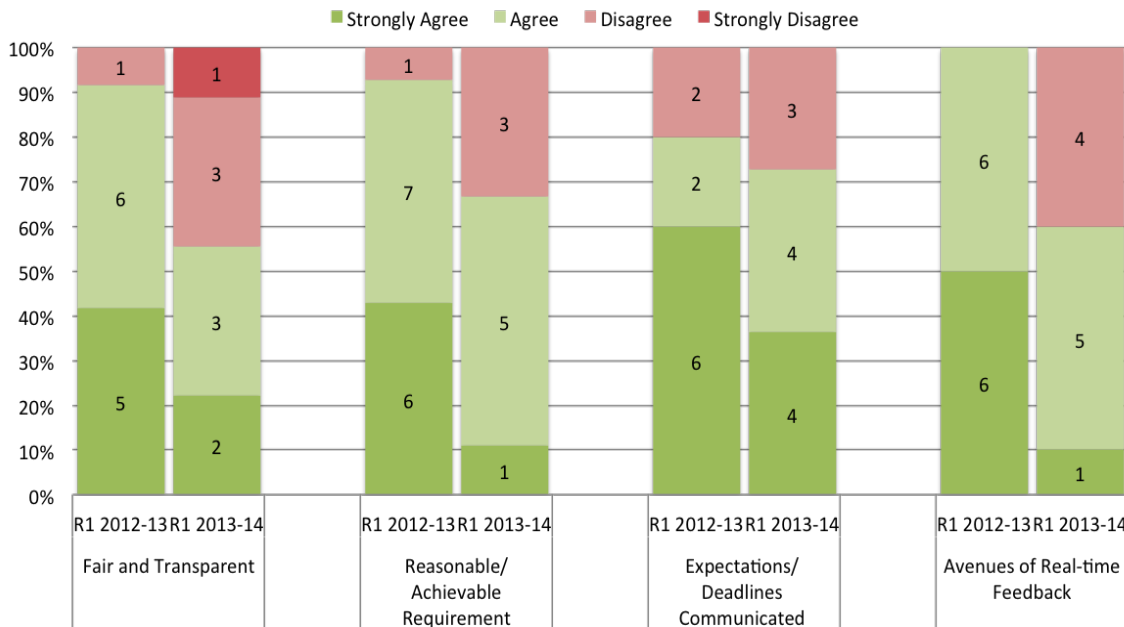


\*Average does not include WMAU who was not funded due to compliance issues, and WMFR whose application was deferred to R2. Average including WMAU request was 78%.

## Entities cited a sizeable decrease in satisfaction with fairness and transparency and avenues of real-time feedback over past cycles.

Reports of dissatisfaction were evenly spread among entities and often related to issues with communication, rather than funding. In fact, the most dissatisfied entities received more than 80% of requested funds.

### Change in Entity Satisfaction with FDC Process



\*No question on the survey was mandatory so sum of N is not consistent across each category.

**“We felt we were not understood.** There was not much query seeking clarification from us. In GAC we used to get more queries than what we got in FDC. We do not know if our clarifications and our context was understood.”

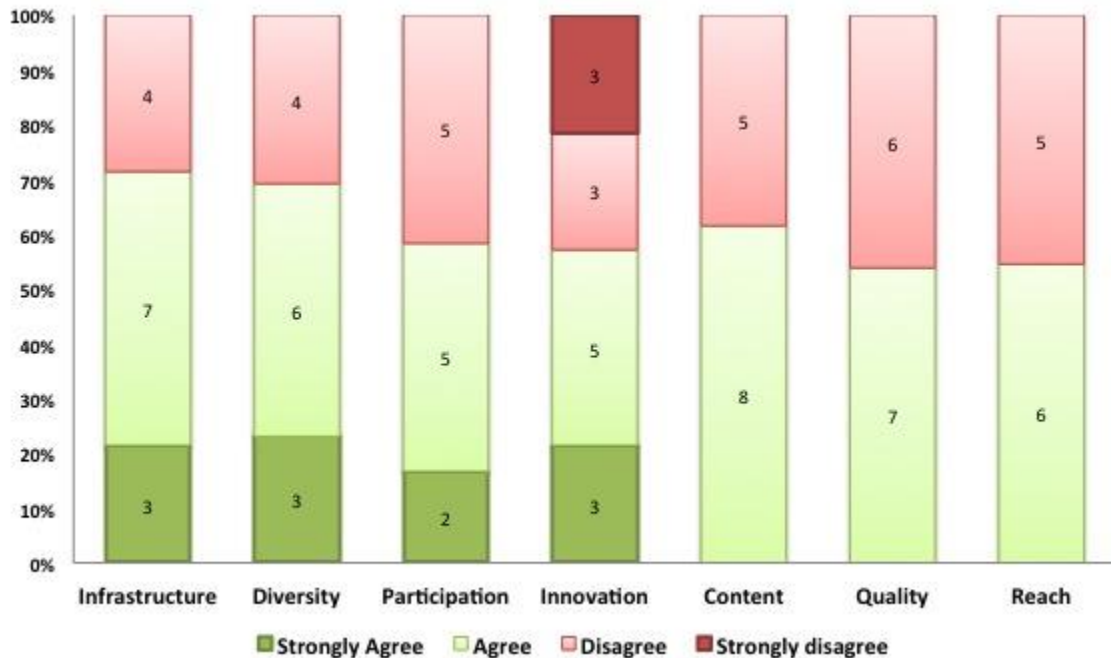
**“The requirements are reasonable and achievable only for chapters that have staff with experience in fundraising,** and have a planning and budgeting process in place.”

“The most recent round was fair, but not transparent. **It was unclear why certain amounts were chosen.** Expectations were not clearly communicated - they change every few months and are often unclear in the first place.”

“Feeling that some information in the proposal and our reports was not read thoroughly by WMF staff and probably even some of the FDC members.”

## Respondents indicate that the FDC process has the most impact in improving infrastructure and diversity, though, overall, there seems to be a downward trend in the perception of how effective the FDC process is in achieving movement goals.

Q: On a scale of 1-4, how much do you agree that the FDC process is enabling greater impact and progress towards Wikimedia's strategic goals?



\*no question on the survey was mandatory, so sum of N is not consistent across categories.

**“The FDC focus on editorship and diversity is clear and strongly felt.** I saw relatively little emphasis on infrastructure and quality.” ~ WMF Staff

**“I really think that accepting the rules of the FDC process helped our chapter to grow in maturity and create a vision for the future.”**  
~Entity

“The FDC process is not meant to impact directly the strategic goal's except stabilizing the infrastructure, and it's ok, **I think the other strategic goals will be improved by side effect of the FDC.**” ~Entity

“There is still not enough information about the impact of the FDC process on achieving movement goals.” ~ FDC Memeber

## **The FDC process may not be the best modality to encourage innovation.**

- “The bidding process does not encourage blue sky thinking - it encourages playing safe.” ~ Entity
- “Strong focus on measurable impact within the projects (new users, new images uploaded, etc.) but more innovative projects have been more debated. The enforcement on the 20% limit may hurt innovation and new projects.” ~ Entity
- “It works very well to stabilise the growth of chapters, but penalises innovation because of the 'pass/fail' or 'success/not a success' nature of questions.” ~ Entity
- “I think the high level of requirement of FDC is an obstacle to encourage structures (chapters etc) to innovate. FDC requires a high degree of goals and metrics that can give up promising but uncertain projects.” ~ Entity

*Investing in training or capacity building that helps entities link SMART goals to innovation may dispel the belief that innovative projects are difficult to plan or measure.*

## **The FDC process has been useful for developing accountability/professionalisation, so while it may not be clear yet whether funding achieves specific impact, the process has encouraged entities to pay attention to how impact is measured/achieved.**

- “There is still not enough information about the impact of the FDC process on achieving movement goals. Individual entities are getting better at doing this, but it's not clear whether that can be attributed to the FDC process.” ~WMF Staff
- “The process is enabling us to check whether annual plan activities have the potential to make an impact towards strategic goals. Whether there is a real impact is not yet clear.”~ Entity
- The FDC process is not meant to impact directly the strategic goal's except stabilizing the infrastructure, and it's ok, the other strategic goals will be improved by side effect of the FDC. ~ Entity

*Both Entities and FDC members indicated a desire for better tools or methods to identify and measure impact.*

## The majority of respondents indicated that they *do not* believe that the FDC process is putting movement funds to the most effective and efficient use.

"MOST effective and efficient use", period? Most probably not. But "MORE effective and efficient use than what existed without/before FDC scrutiny"? Certainly!" ~ WMF Staff

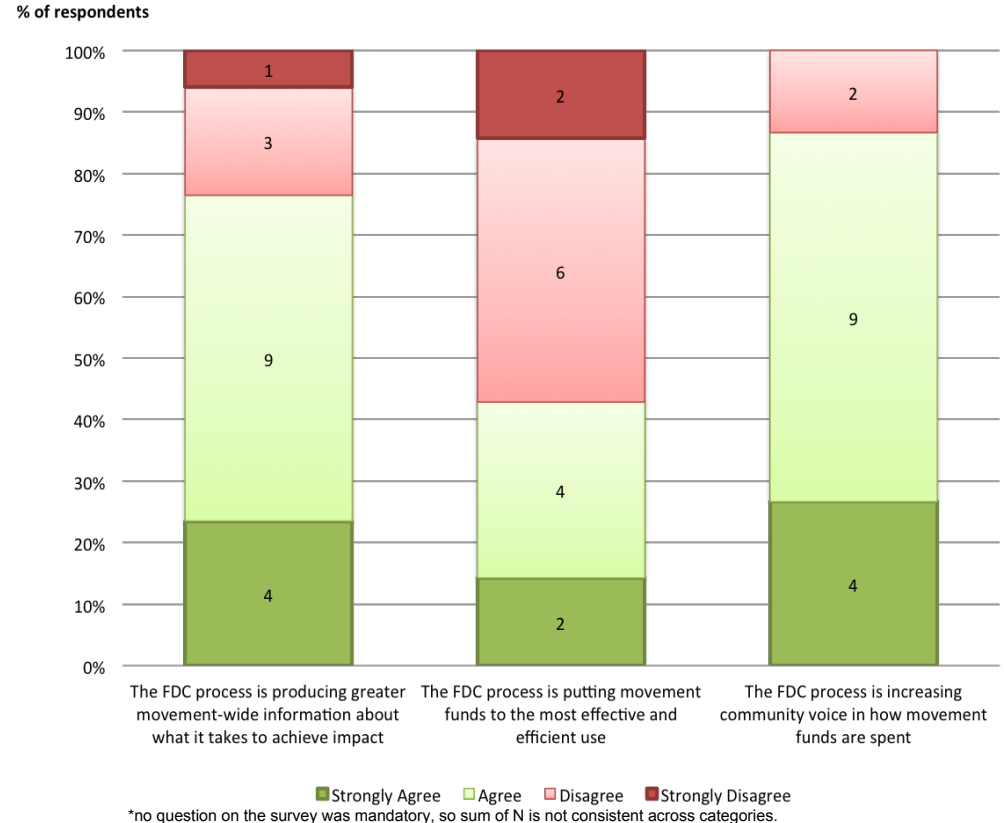
"It generates half decent data, but creates a large overhead which reduces efficiency." ~ Entity

"Grantees are encouraged to use up the grant even if it might not be the most efficient way." ~ Entity

**While more community comments is desired, comments can be problematic when coming from those unfamiliar with the FDC process.**

"Most of the questions we received from the community highlighted the cultural differences between the various communities in the world. We have invested many hours in explaining and our answers are not always accepted. The questions we received from the FDC staff was much more significant." ~ Entity

"FDC process has increased the opportunities for the community to have impact and discuss but this have not been used yet by the community. Very few comments from the average members of the community and few also even from the highly-involved members." ~Entity





# Key themes and recommendations from 2013-14 FDC Round 1 Process Survey

## Improve communication between Entities and the FDC:

- Consider allowing Entities to speak with FDC via video call during deliberations.
- Improve clarity of FDC comments regarding funding decisions.
- Create an infographic or webinar to explain FDC decision making process.

## Increase WMF staff support to Entities:

- Improve proposal guides to include clear information on budget guidelines and reasonable growth rates.
- Develop training materials to help Entities align SMART goals with innovation.
- Consider conducting pre-application workshops that focus on project development, budgeting and programming.

## Cultivate higher quality community input:

- Use Simple English in portal to allow for translation so that community can read proposals in local languages, even if application is ultimately submitted in English.
- Invite Entities to participate in peer review.
- FDC comments and questions are very valuable during community feedback stage.

## Other areas of improvement:

- Consider simplifying quarterly reporting requirements to focus on spending and impact measures.
- Have Entities create Learning Patterns instead of narrative accounts of successes and failures.
- Review policy on unspent funds.