A Field Guide to Annual Plan Grants

Who What When Where Why & How

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What is an Annual Plan Grant (APG)?

A = Annual (something that happens every 12 months or lasts for 12 months)

P = Plan (describes what you will do, how you will do it, and also why)

G = Grant (money given for a specific charitable purpose)

Grants for mission-aligned groups

For organizations and groups that are very closely aligned with the Wikimedia mission. Most (but not all) organizations that receive annual plan grants are chapters, thematic organizations, or user groups.

To fund a plan and budget for an entire year

This grant includes all of the funding your organization needs from the Wikimedia Foundation for the entire grant period (usually 12 months).

★ This means you need to plan your expenses and activities in advance.
★ This means that you don't have the flexibility to ask for more funding. You can still request an event grant if you are hosting an international event.
★ You can request changes to your plan or budget, but those need to be approved by the Wikimedia Foundation before you make them.

To support volunteers to do programs

Your grant should be focused on supporting the volunteers who do program work for your group.

★ Your plan should be organized as 1-4 programs with shared objectives and common ways of working; this is not a list of activities.

★ Your plan cannot include paying volunteers, or paying staff to do activities that are usually done by Wikimedia volunteers.

Who is the FDC-APG process for?

It's for a certain type of Annual Plan Grant (APG) available to organizations that already have significant experience doing Annual Plan Grants. You should only apply here if you already know you are eligible.

Who is the Simple APG process for?

This is for everyone else — from those applying for their very first Annual Plan Grant (APG) to those with many many years of experience who don't need or want to go through the FDC process, but there may be limits on the amount of funding you can request.

This process is designed to support applicants and grantees at different times in their group's development.

Advice from applicants

*There should be a recommendation written in bold for **everyone to ask questions rather than keeping hesitations to oneself**.*

Once we learned that, we did just fine.

-Anonymous feedback provided by an applicant through the SAPG pilot survey

IS OUR GROUP ELIGIBLE?

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"Capacity" = A Thing You Can Do

This is a term that describes the things a person, group, or community can do.

You, your group, or your community may be able to do some things well and may not be able to do other things well.

No person, group, or community has the capacity to do everything equally well :)

Developing some capacities may be essential to achieving your goals; others will not be relevant to your goals.

Community Capacity Development Map

Are you interested in understanding what capacities your group or community may already have?

This is a useful tool that can help your community or group get a better sense of where you may already have capacity, and where you may not. For example, you may want to know where your group is in the area of "Organizational governance".

https://meta.wikimedia.org/wiki/Community_Capacity_Map

When to apply?

Apply for an annual plan grant only when the easier and more flexible options, like a series of Rapid Grants, will no longer allow you to do what you need.

Make sure your group has these capacities:

★ Can receive and manage funds
★ Experienced with grants & programs
★ Organized and has enough volunteers

You are set up to receive & manage funds

★ You have some experience receiving funding from the Wikimedia Foundation in your country, and so you know you can do so legally and safely.

★ Your group produces regular budgets and financial reports, and has adequate financial procedures and controls in place.

★ If neither of the above, you have an approved fiscal sponsor in place to help you with managing your grant at this stage.

Your group has experience

You have completed many successful smaller grants from the Wikimedia Foundation, through [Project Grants](#) or [Rapid Grants](#), with a level of financial responsibility that is similar to your new request.

You have demonstrated that you are able to evaluate your activities, report on them, and apply learning to your future plans.

You have built up significant experience and expertise in the areas where you plan to work.

Your group is organized & has volunteers

Your group has a good relationship with communities on the Wikimedia projects, and with other groups in your region. Your group is not engaged in active conflicts with others.

Your group has defined ways of making decisions and planning together. You have people in your group who can take on more responsibility, and they are supported by the rest of the group.

Your group has enough volunteers to do the work you are proposing, and / or this work will lead to growing your community of volunteers.

What about staff?

Groups will not be able to request any paid staff (full or part time) until they have several years experience doing successful annual plan grants.

★ Staff cannot replace the work of volunteers.
★ Staff should bring needed expertise to the organization.
★ Organizations must have the capacity to hire and manage staff.

What about third party contracts for services?

If you have the ability to make a contract with a third party, you may be able to apply for funds to pay for third party contract services for a specific purpose and during a specific time period. For example,

★ The assistance of a professional accounting firm.
★ The assistance of a professional firm to advice on legal or governance issues.
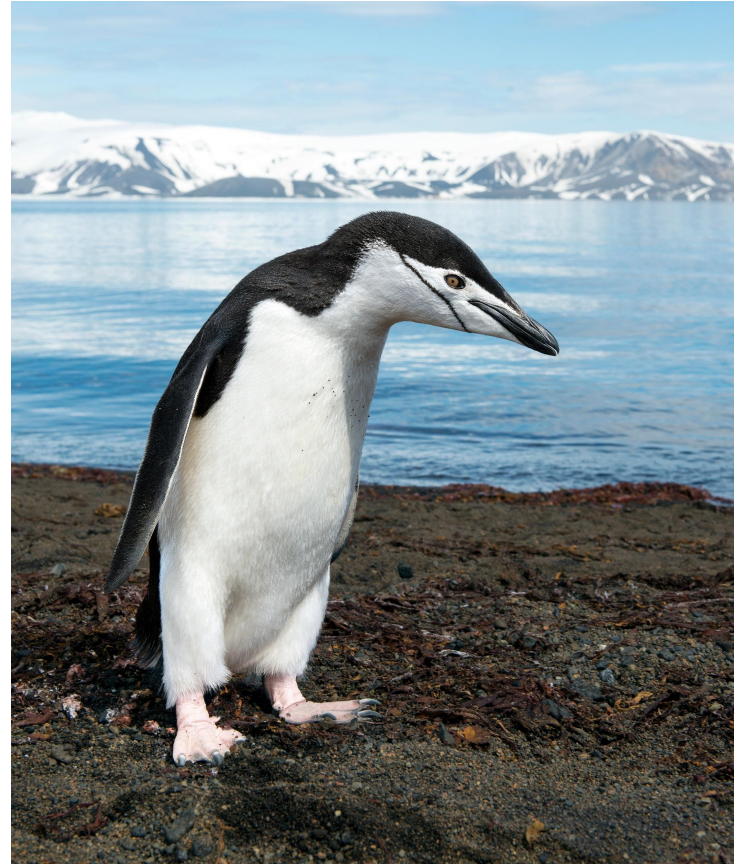★ Project-specific timebound services such as printing, communications, IT services, PR services, event services, etc.

Eligibility Case Study:

Wikimedia Community User Group Antarctica

This user group is **not legally incorporated**, but they have designated several leaders that have the support of the group (a healthy mix of penguins and humans). They have **a bank account with at least two human signatories**. They produce an annual financial report once every year (mostly done by the penguins).

In the past year, they completed 4 Rapid Grants (2 community events, 1 photo competition, and 1 pilot education program) totaling US$8,000, and also 1 Project Grant to expand their photo competition totaling US$10,000, or **5 grants for a total of US$18,000 altogether**. The grants had good results, were reported on in a timely way, and evaluated effectively. Once again proving the old adage to be true: "Penguins get stuff done."

The group wants to apply for their first APG because **they wish to expand** their program work, **operate several programs at the same time**, and because **they need some funding for basic operating costs**. In particular, the rental of a barrier to put up at community events that will prevent new members from pushing each other off of a cliff into elephant-seal infested waters where they might face their doom. They learned from previous events that this was really dragging down the number of "surviving editors"!

Is WCUGA eligible?

They do not need to be legally incorporated, as long as they have leadership in place and they are able to receive funds in an approved bank account.

They wish to expand, do several programs at once, and need operating costs, so APG may be a good match for them.

They have experience in the areas of education and photo competitions, demonstrated through a series of past successful grants.

Which of these grant ideas might be eligible?

★ $10,000 to do two community events, two photo competitions, and to continue the education program.

★ $22,000 without permanent staff, to expand education program work and photo competitions and to contract accounting services.

★ $25,000 including a part time staff program manager, to expand education program work and photo competitions.

★ $23,000 without any staff, to expand education program work and photo competitions and to rent a weekly space for safe community events.

★ $50,000 including a full time program manager, to expand education program work, photo competitions, and to launch a national GLAM initiative.

Are they eligible to apply for this grant?

US$50,000 including a full time program manager, to expand education program work, photo competitions, and to launch a national GLAM initiative.

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US$50,000 including a full time program manager, to expand education program work, photo competitions, and to launch a national GLAM initiative.

US$50,000 is more than twice what this group has received in total grants over the past year (~US$18,000).

They need the funds to launch a national GLAM initiative but don't have prior experience in this area yet.

This group has never had staff before, so they aren't able to request a fulltime program manager.

Are they eligible to apply for this grant?

US$25,000 including a part time staff program manager, to expand education program work and photo competitions.

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US$25,000 including a part time staff program manager, to expand education program work and photo competitions.

US$25,000 is at the higher end of the range this group should apply for, since their baseline is ~US$18,000.

They are building their plan around areas where they already have good expertise and experience (education & competitions).

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US$22,000 is in the range this group could apply for, since their baseline is ~US$18,000.

They are building their plan around areas where they already have good expertise and experience (education & competitions).

They can include a request for funds contract accounting services if they have this need!

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They are building their plan around areas where they already have good expertise and experience (education & competitions).

They can include a request for renting space for their community if they have a good reason for doing so, especially if it is a temporary or shared space.

Are they eligible to apply for this grant?

$10,000 to do two community events, two photo competitions, and to continue the education program.

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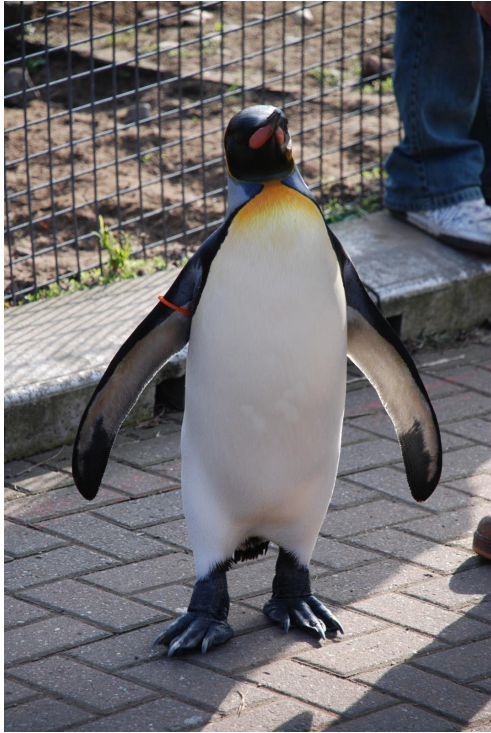$10,000 to do two community events, two photo competitions, and to continue the education program.

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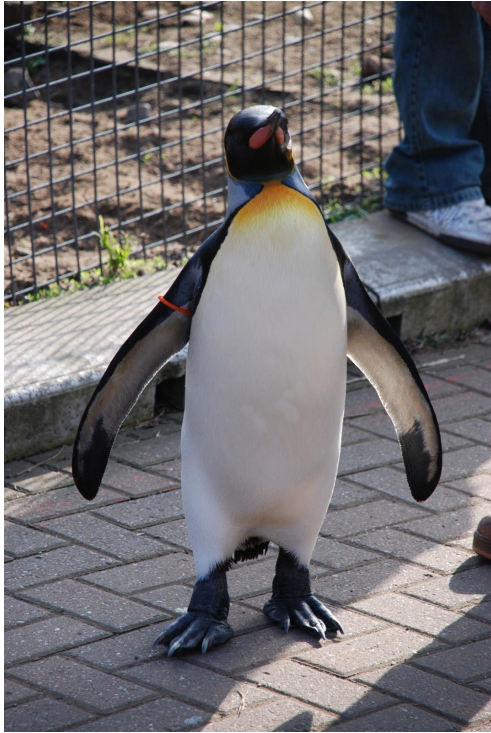
They are building their plan around areas where they already have good expertise and experience (education & competitions).

They don't have a need for operating costs and it seems like their expenses can be covered through a series of Rapid Grants, so an APG may not be a good option.

But… what about Nils Olav III?

But... what about Nils Olav III?

[Brigadier Sir Nils Olav is a king penguin who resides in Edinburgh Zoo, Scotland. He is the mascot and Colonel-in-Chief of the Norwegian King's Guard.](#)

While this is very impressive, Annual Plan Grants are only available to groups and organizations and not to individuals. As an [individual bird](#), Nils is not eligible.

Sorry, Nils.

Try [Project Grants](#)! Or contact your local chapter :)

WHAT NEXT?

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How to apply

Visit Meta Wiki to learn more: https://meta.wikimedia.org/wiki/Grants:Simple.
Follow the instructions there to contact an APG program officer.

The application process may take several months from when you apply to when you receive your funding. During some times of year, applications may be limited.

Talk to some committee members! Who are they?

Who are our committee members?

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The portrait of Kai is dedicated to the public domain, and is on [her website.](#)

List of committee members

- Ido Ivri, 1 Feb 2017 - 31 Jan 2018 (serving since Oct 2015)
- Chinmayi S.K., 1 Feb 2018 - 31 Jan 2019 (serving since Feb 2017)
- Linar Khalitov, 1 Aug 2017 - 31 Jul 2018 (serving since Aug 2016)
- Liang-chih Shang Kuan, 7 May 2017 - 30 Apr 2018
- Kai Alexis Smith, 11 May 2017 - 30 Apr 2018
- Susanna Mkrtchyan, 12 May 2017 - 30 Apr 2018
- Isla Haddow-Flood, 21 May 2017 - 30 Apr 2018
- Rohini Lakshane, 2 Jun 2017 - 31 May 2018
- Philip Kopetzky, 23 Jan 2018 - 31 Jan 2019