

# WELCOME

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Program Capacity and Learning Retreat

# SETTING THE STAGE

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Welcome and Introductions

Agenda

Ground Rules

# Mutual Learning Mindset

## Values

- Transparency
- Curiosity
- Informed Choice
- Accountability
- Compassion

## Assumptions

- I have information; so do others.
- Each of us sees things others do not.
- People may disagree with me and still have pure motives.
- Differences are opportunities for learning.
- I may be contributing to the problem.

## Behaviors/Ground Rules

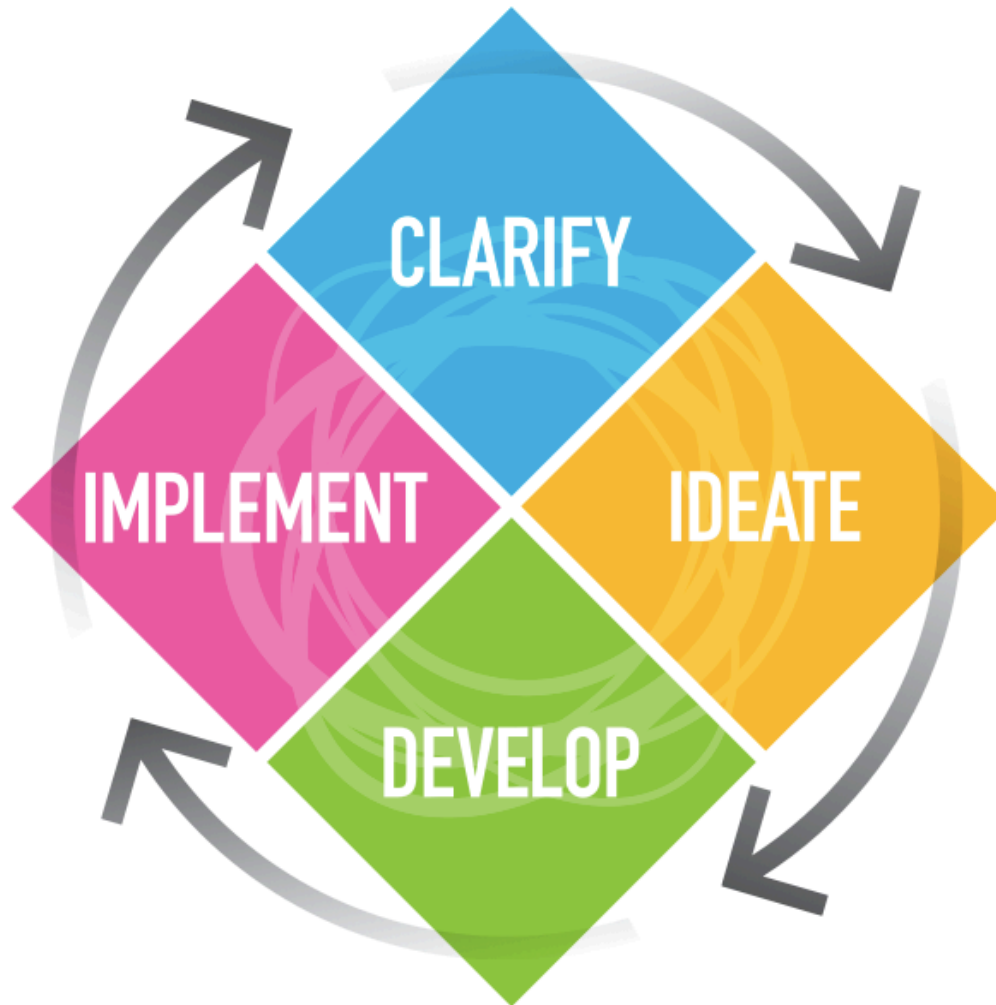
- State your views and ask genuine questions.
- Share all relevant information.
- Use specific examples and agree on what important words mean.
- Explain your reasoning and intent.
- Focus on interests, not positions.
- Test assumptions and inferences.
- Jointly design the next steps.
- Discuss the undiscussable (those elephants in the room).

# SETTING THE MINDSET

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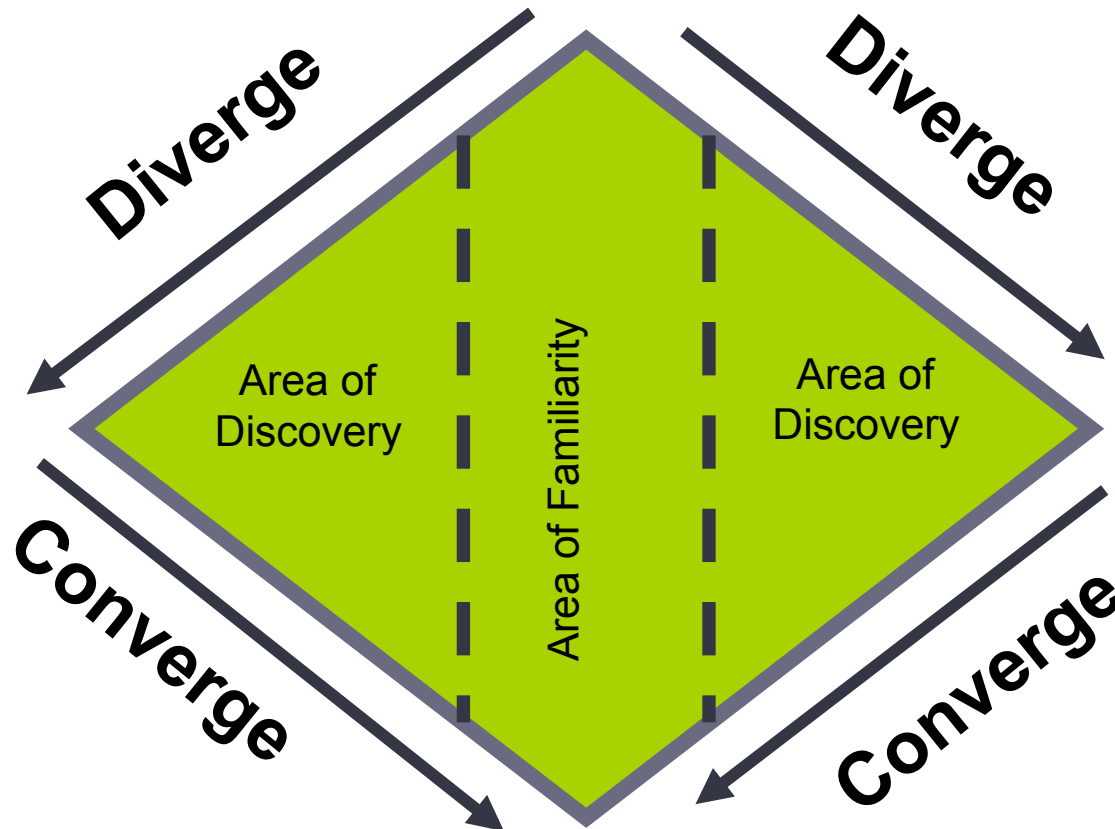
Co-Create and Collaborate with Creative  
Problem Solving Methodology

# Creative Solving Process Model



# The Dynamic Balance of Creativity

- Separate Divergent and Convergent Thinking



# Divergent Thinking Guidelines

- Defer Judgment
- Combine and Build on Ideas
- Seek Wild Ideas
- Go for Quantity

# Convergent Thinking Guidelines

- Be deliberate
- Check your objectives
- Improve your ideas
- Be affirmative
- Consider novelty



# Praise First – “Yes, And” Thinking

**“Yes, AND”  
instead of “No, BUT”**

- Keeps ideas open instead of closing down someone’s idea
- Creates an opportunity to overcome weaknesses and strengthen ideas

# State Challenges as Questions

- In What Ways Might We...
- How Might We...
- How to...

# Have a Creative Attitude!

- Be positive and collaborative
- Openness to change is critical for evolution and long-term success

# Summary of Core Principles

- The Dynamic Balance of Creativity
- Divergent Thinking
- Convergent Thinking
- Praise First; “Yes, And” Thinking
- State Challenges as Questions
- Have a Creative Attitude

# CE MANDATE

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# Strategic Priorities

- **Foster sustainability.** Build and protect community sustainability when feasible
- **Improve impact.** Ensure contributor time and donor dollars have impact on gaps and mission
- **Enhance adaptability.** Support cross-movement cooperation and leadership to improve response to challenges

# SUCCESS CRITERIA

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# Success Criteria

- Impact \*
- Scalability
- Sustainability
- Community Need
- Our Fit – broader Q of what fit means
  
- Capacity builders ... paid staff can provide a multiplier effect.
  
- \* Impact:
  - Enabling contributors to impact readers
  - Different definitions by program – tension point
  - Director to decide final prioritization



# Defining Scalability

- Definitions of scale included:
  - Exponential growth and continuous improvement
  - Efficiency
  - Effectiveness in leveraging resources
  - Delivering high quality of services with consistency
  - Ability to replicate the program model

# VISUAL EXPLORER™

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VE is a tool for making sense of shared, complex challenges using creative dialogue.

# The Star Model

## Dialogue by Putting Something in the Middle

This process respects the safety, privacy, and authority of each participating member.

Each point on the star represents a group member

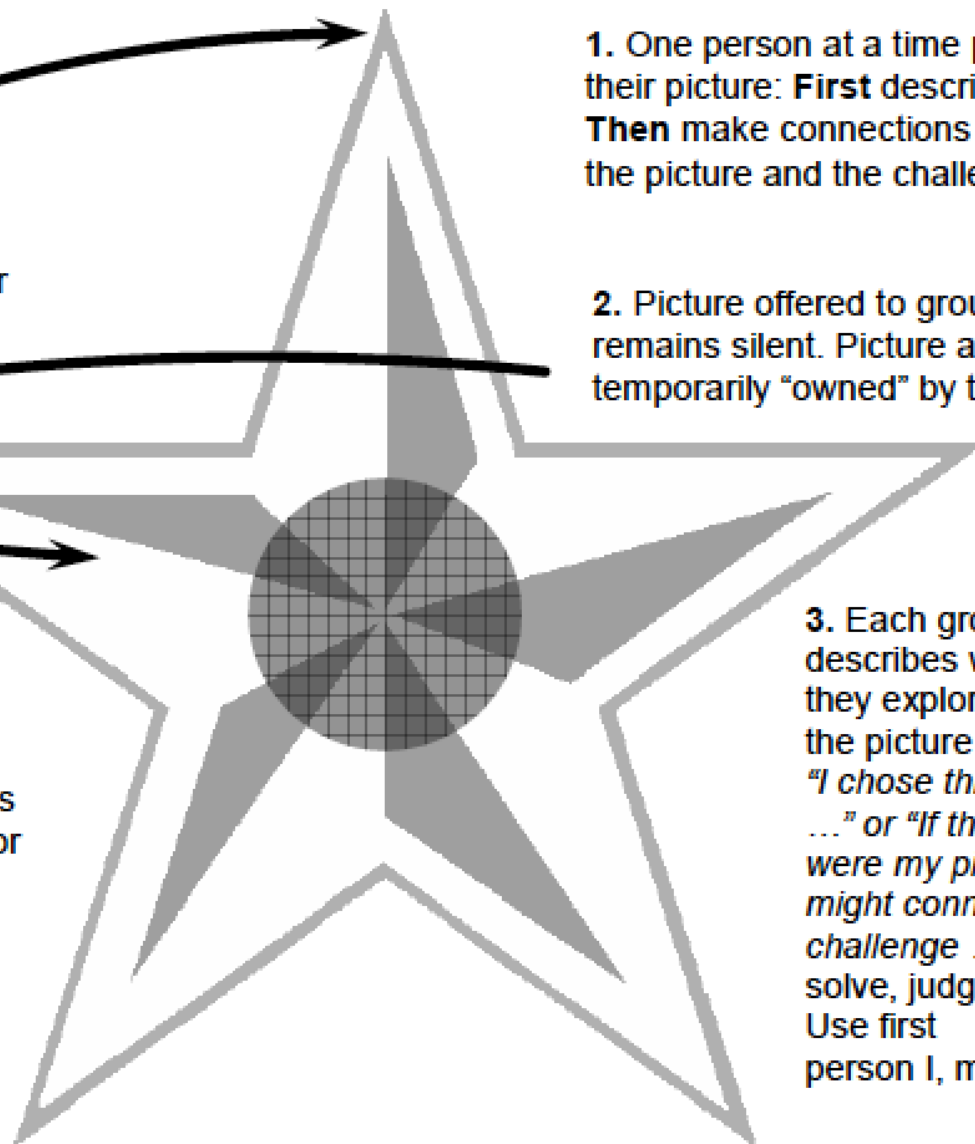
5. Repeat for other group members.

4. Picture is given back to the originator. Originator is not obliged to "own" interpretations offered by the group. Originator has the last word — minimum of "thank you".

1. One person at a time presents their picture: **First** describe it. **Then** make connections between the picture and the challenge.

2. Picture offered to group. "Owner" remains silent. Picture and challenge are temporarily "owned" by the group.

3. Each group member describes what they see. Then they explore connections from the picture to the challenge: *"I chose this picture because ..."* or *"If that were my picture, here's how I might connect it to the challenge ..."* Don't problem-solve, judge or give advice. Use first person I, me, my, **not you**.



# Hopes and Fears

# Strengths & Aspirations

Ideas from the former  
“Learning & Evaluation”  
Team

# Overview Slide:

**What We Do:** Learning and Evaluation

**How We Do It:** [https://commons.wikimedia.org/wiki/File:Learning\\_and\\_Evaluation\\_teams.pdf](https://commons.wikimedia.org/wiki/File:Learning_and_Evaluation_teams.pdf)  
<https://meta.wikimedia.org/wiki/Grants:Evaluation>

**Who We Do It With:** Grants Officers, WMF Teams, Program Leaders, Community at Large

**Staff:** Jaime Anstee (1) Edward Galvez (1) Maria Cruz (1) Rosemary ( 5.0)

**KPI's:** Resource page editors, Resource pageviews, Learning patterns created, Community Leaders engaged

## Top Three results currently planned/achieved in the 2015-2016 annual plan

- 1) Improve data quality and ease of data collection for volunteers via APG event template.
- 2) Data informed decisions via community polling, grants analysis.
- 3) Community voice in sharing best practice and lessons learned

# **L&E Strengths & Assets:** What we do well, what works, and is critical to our broader PC & L and CE mission?

- |  |
|--|
| <ul style="list-style-type: none"><li>● Learning &amp; Knowledge Exchange --Design, Use and value of tools ,resources and portals evidenced in Community Consultation Survey.</li><li>● Communications /Community Storytelling</li><li>● Baseline reports in what we've learned from programs.</li></ul> |
| <ul style="list-style-type: none"><li>● Expertise in Leadership Development, Coaching/ Mentoring, Program Design and Evaluation</li></ul>  |
| <ul style="list-style-type: none"><li>● Data Insights &amp; Use</li><li>● Active Peer Cohort and Facebook Community to build upon.</li><li>● Growing demonstration by grantees of metrics reporting</li></ul>  |
|  |
| <ul style="list-style-type: none"><li>● Evaluation/Impact Strategy</li></ul>   |



We grow our  
movement  
through what  
we do best...  
Sharing  
Knowledge.  
2015 - 2016



# L&E Aspirations for Highest Impact, Growth & Sustainability 2015- 2016

- Shared understanding of impact across the movement.
- Empower leaders of communities and chapters to become partners in global strategy and learning.
- A participatory and comprehensive understanding of development and context in different regions in the world.
- We model best practices in community engagement, evaluation, program design and impact.
- Support the growth of programs and partnerships from creation to scaling
- Self-Evaluation (lead by example) partners in increased evaluation practice and use
- Empowered community members that understand what works best in their context and who they need to connect with
- High Impact Programs are Replicated/Localized
- Put ourselves out of a job, one program leader at a time.
- Be the bridge between technology and programs
- Sustainability (hold ourselves to the same standards) partners with affiliates on specific campaigns to curate content
- Communities that feel a sense of belonging on Wikimedia platforms because of their context and background, vs how close they are to an already known definition of success
- Programs without impact see reduced resourcing (volunteers/funding).
- Be the bridge between technology and programs
- Integration of Programs--Education, Local Partners (Museums/Libraries), Contributors.
- Visual Data--reduced staff time on analysis.

# L&E Resources & Results for Aspirations:

## Learning - Peer-to-Peer

- Program leaders implement skills adopted after capacity-building opportunities (outcomes via tracking and a monitoring survey)
- Replication of Train-the-Trainer workshops and trainings by community members in their local communities
- Increased community awareness of resources
- Tangible outcomes from conferences and in-person events.
- Continued evidence of evaluation capacity development (Evaluation Pulse)
- Growth in number of \*official\* chapter's/user group local partnerships
- Increased community engagement and contributions to portal resources

## Learning - Impact

- Start conversation on impact, theory of change, and impact measurement
- Co-create with community leaders, a shared definition and an impact assessment tool
- Increased use of locally-relevant metrics
- Evidence of data used to improve/scale programs

## KM - Tools & Tech

- Increased tools usage.
- Tools to make collecting metrics easier; requires more coding capacity (sql, python)
- Build metrics collection into program leader's workflows; requires analysis of workflows and development of tools (program management and metrics collection tools) to integrate
- Tech support for learning patterns + testing
- Measure number of programs using new wiki software or tools

## KM - Community Insights/Voice

- Survey response rates for strategy work, surveys to test contributor community pulse
- Community leader engagement in different channels
- Collective project with affiliates to build non-wiki survey bank tool
- Clear Data through polling and research indicating tools most needed by community.
- Increased satisfaction with WMF partnership and resources

The Former  
“Wikipedia Education  
Program” Team

# Overview Slide: Education

**What We Do:** We work for and with community members, volunteers and affiliate organizations worldwide to develop and communicate around global tools, resources and mentoring so that people can use those tools to run an education program in their country or region.

**How We Do It:** Our team nurtures, grows and improves the effectiveness of Wikipedia Education Programs so that they have a positive impact on Wikimedia projects. We encourage high quality contributions, foster gender diversity, and promote Global South participation.

**Who We Do It With:** Volunteer community members, Chapter staff, professors.

## **KPI's:**

- Number of interactions with individuals in different countries

- Number of referrals by education team members to other program leaders

**Top Three results currently planned/achieved in the 2015-2016 annual plan: None specified in annual plan.**

- Programs and Events Dashboard

- Data collection and analysis

- Documentation and better internal coordination

## **Staff:**

- Floor Koudijs - Senior Program Manager, Wikipedia Education Program (0.8 FTE)

- Anna Koval - Program Manager, Wikipedia Education Program (1 FTE)

- Tighe Flanagan - Program Manager, Wikipedia Education Program (1 FTE)

- Samir Elsharbaty - Consultant (1 FTE, contractor)

**Strengths & Assets:** What we do well, what works, and is critical to our broader PC & L and CE mission?

Get new voices represented on Wikipedia and sister projects  
(student population, emerging communities, women)

Increase quality contributions on the projects

Support leadership development by encouraging community  
mentorship and programmatic scaling.

Great relationships with community

We have data!

Strong, close-knit team that support each other

# Aspirations for Highest Impact, Growth & Sustainability 2015- 2016

If continuing in current strategic direction:

- Support and further engage the Education Collaborative

- Build Programs and Events Dashboard

- Develop systematic yearly data collection process

If dreaming big is possible:

- Increase team's impact by improving regional representation

- Provide additional tech tools and resources

- Think beyond traditional "Wikipedia Education Programs":

  - Encouraging government partnerships

  - OERs & MOOCs

# **Resources & Results for Aspirations:** (How will we measure results/success, what resources do we need to get there [i.e. people, skills, technology])

Success: If continuing in current strategic direction:

A functioning Programs and Events Dashboard that is in use by multiple countries (outside of the US) and that provides easy data for program leaders

A healthy and vibrant Education Collaborative that supports global education programs

Resources:

Regionally focused team members or topically focused team members

Tech product manager on team

Additional budget & staff to build needed tech resources + additional budget & staff for maintenance.



# The Wikipedia Library

# Overview Slide:

**What We Do:** Help editors access research resources and expertise

**How We Do It:** Access gifts, reference collaborations, global branches, tech

**Who We Do It With:** Publishers, librarians, community volunteer leaders

**Staff:** Jake, Alex, and Nikki (+ a little Patrick)

**KPI's:** Accounts distributed, Number of Active Global Branches

**Top 3 in 2014-2015:** 28 publishers (+200%), 8 branches (+260%), Hired coder

**Staff (FTE) and Names:** 2.5 (Jake, Alex, Nikki)

**Strengths & Assets:** What we do well, what works, and is critical to our broader PC & L and CE mission?

We pitch publishers to give top editors a vital resource

We leverage community to distribute resources and create research hubs

We network with leading librarians and reference experts

We scale globally through community leaders

We innovate through tech and collaborations

Interaction

Tools

Print/export

From Wikipedia, the free encyclopedia

## How do I use Wikipedia for research?

Wikipedia helps you learn, but it should be the place to *begin* your research.

What question do you have about Wikipedia?

[When is Wikipedia useful for research?](#)

[Should I cite Wikipedia?](#)

[How reliable or accurate is Wikipedia?](#)

[How are Wikipedia articles structured?](#)

[How can I know a Wikipedia article's quality?](#)

[What if I can't access sources cited in a Wikipedia article?](#)


[What if Wikipedia doesn't have the information I need?](#)

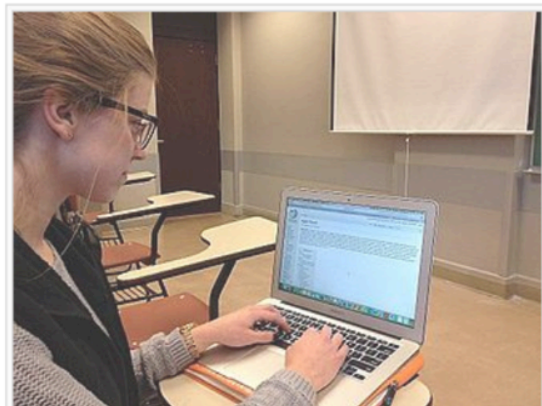
### Having trouble finding the information you need on Wikipedia?


1. [Read tips about navigating and finding content on Wikipedia](#)
2. [See tips for finding the sources cited in Wikipedia](#)
3. [Go to our reference desk where Wikipedia editors can help you find information](#)
4. [Find a librarian near you whom you can ask for help](#)

### When is Wikipedia useful for research?

Wikipedia, like other [encyclopedias](#), provides a general overview of most subjects in its scope. Wikipedia's scope includes all human knowledge, so we have articles about topics as diverse as science, local history, and popular culture. Volunteers write Wikipedia articles as summaries of the best information on a topic. [by summarizing the information found in](#)

Take a short survey about this page! 



Wikipedia makes a great starting point for research, but it  shouldn't be your end point!

### Are you an educator or librarian?

*Did you know that Wikipedia has resources for you to help teach information literacy?*

The Wikipedia community doesn't want your students and

# Aspirations for Highest Impact, Growth & Sustainability 2015- 2016 - Long Term Strategies for Opportunities

**Literacy** - Develop scalable strategies/plan for Wikipedia's research to have a reciprocal reader impact - if we are getting volunteers paywall access, how do readers access? How do they get to their library?

**Librarian Engagement** - Facilitate a scalable international strategy for Libraries to participate at scale in tech and community

**Infrastructure** - Create partnerships that allow us to provide the full technical services that researchers expect from libraries.

**Access** - Create strategy to move beyond single-account distribution strategies, to include institutional access, cross-collection discovery, and OA integration

**Team** - ensure technical and people capacity for facilitating infrastructure

# Resources & Results for Aspirations:

(How will we measure results/success, what resources do we need to get there [i.e. people, skills, technology])

KPIs: better metrics on impact and usage

People: strengthening contractor and volunteer roles

Money: building business case for funding

Coding: iterative expansion of the library card platform

Collaboration: key institutional partners

Focus: continue doing what we do best

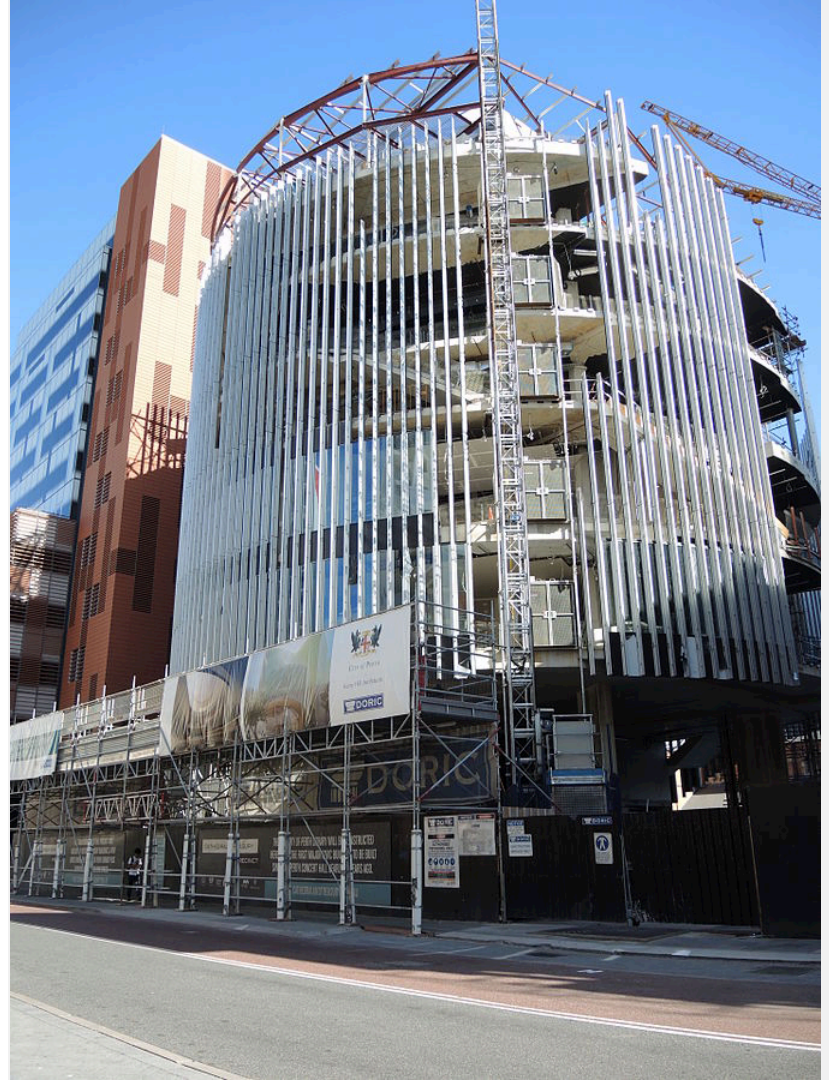
Experimentation: explore new areas of program capacity (10%)

# Prioritization of current MPL & Workflows based on Filters

<https://docs.google.com/spreadsheets/d/16XFItb1uxwC-RhbzuCB6MkK29h5ZZYJy0yhDxILZQeo/edit>

**Considering the filters of** a) Impact b) Scalability c) Sustainability d) Community need e) Our fit (1 lowest rating - 5 highest rating)

Image reflecting  
your team's  
aspiration for  
community.  
2015 - 2016





# A New Call: Affiliate Partnerships

# Overview Slide:

**What We Do:** Affiliate Partnerships

**How We Do It:** Affiliate engagement and support

**Who We Do It With:** Affiliates, WMF Teams, Communities at Large

**Staff:** Rosemary Rein Jaime Anstee

**KPI's:** TBD

**Top Three results currently planned/achieved in the 2015-2016 annual plan**

N/A

# **Strengths & Assets:** What we do well, what works, and is critical to our broader PC & L and CE mission?

- There is an earned Reputation of individual staff, particularly CE and Communications at WMF.
- Relationship Management and Community Experience on the team in addition to Non-profit Governance/Capacity Building and expertise in impact/evaluation, program design.
- Staff competency in training, instructional design, facilitated and online learning, community consultations, organizational development, communications.



[https://upload.wikimedia.org/wikipedia/commons/4/4f/Trust\\_%28466709245%29.jpg](https://upload.wikimedia.org/wikipedia/commons/4/4f/Trust_%28466709245%29.jpg). Uploaded by Luis Villa

# Aspirations for Highest Impact, Growth & Sustainability 2015- 2016

- Map a Path for Trust Building between WMF and Communities. Be able to measure year to year progress and pain points. Build trust and respect with our honesty.
- Have a better and more well received annual plan which is grounded in community voice.
- Execute a Pro-active Affiliate Communications and Engagement Plan beyond reactionary / problematic responses.
- Engage AffCOM in a new way as key advisors.
- Assess what our affiliates really need rather than guessing.
- Communities of Practice (empower movement leaders) facilitators of peer-to-peer learning and elevators of diverse voices
- Sure up our knowledge of community in an organization with changing people. Expand individual trust and knowledge to WMF .

# **Resources & Results for Aspirations:** (How will we measure results/success, what resources do we need to get there [i.e. people, skills, technology])

- Community leader engagement and outcomes via monitoring survey
- Partnership development
- Increased affiliate project/program capacity
- Increased satisfaction with WMF partnership and resources
- Replication of TtT workshops

# Appendix

- May include important community data to consider in the blueprint
- Screen shot of resources/tools

# Evaluation Pulse

133 Program Leaders took the 2014 mini *Evaluation Pulse* as part of the *Reimagine Grants Community Consultation*



# When asked in the overall consultation survey to rank the top four resources that are most important for accomplishing Wikimedia-related goals in the next year program leaders...

Assigned the highest mean rank to:

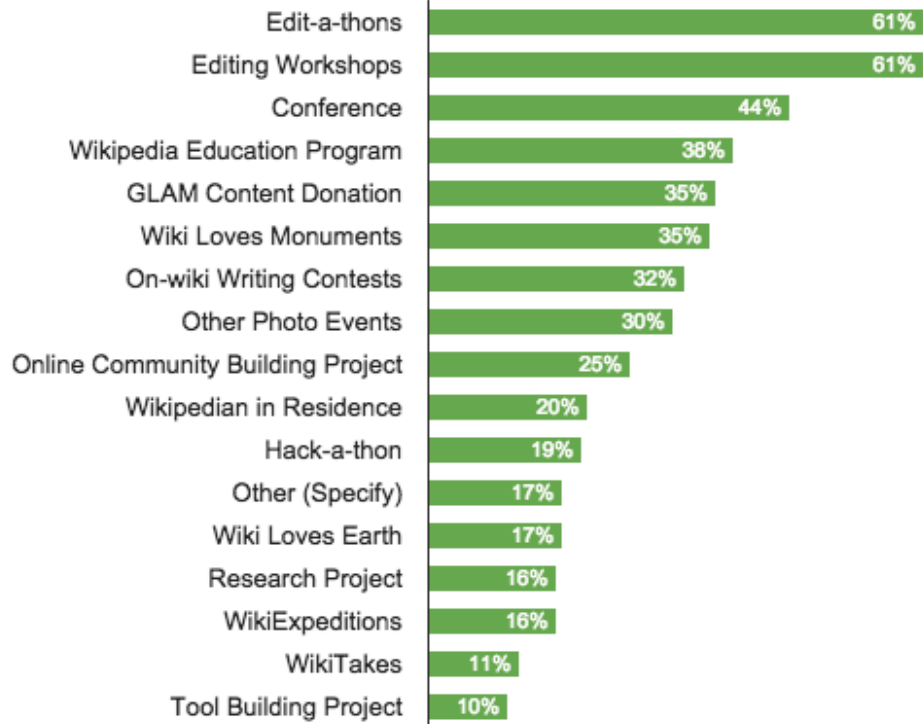
1. **Online program resources (e.g., toolkits, program reports, learning patterns)** (2.2 mean rank)
2. Budget or financial guidelines, resources, or advice (2.3 mean rank)
3. Connections to others with relevant skills or experience (in-person events or online introductions) (2.4 mean rank)

Most often ranked:

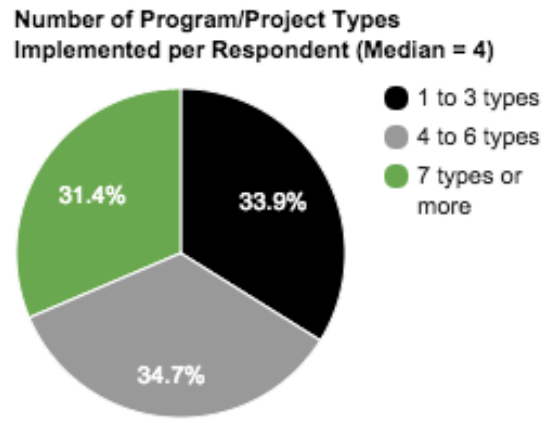
1. **Connections to others with relevant skills or experience (in-person events or online introductions)** (6% of point distribution)
2. Budget or financial guidelines, resources, or advice (5% of point distribution)
3. Online program resources (e.g., toolkits, program reports, learning patterns) (4% of point distribution)
4. Mentorship from WMF staff (longer term) (4% of point distribution)
5. Specific feedback or coaching from WMF staff, as needed on a case by case basis (4% of point distribution)



# 122 of the program leaders had run at least one program in the past 12 months



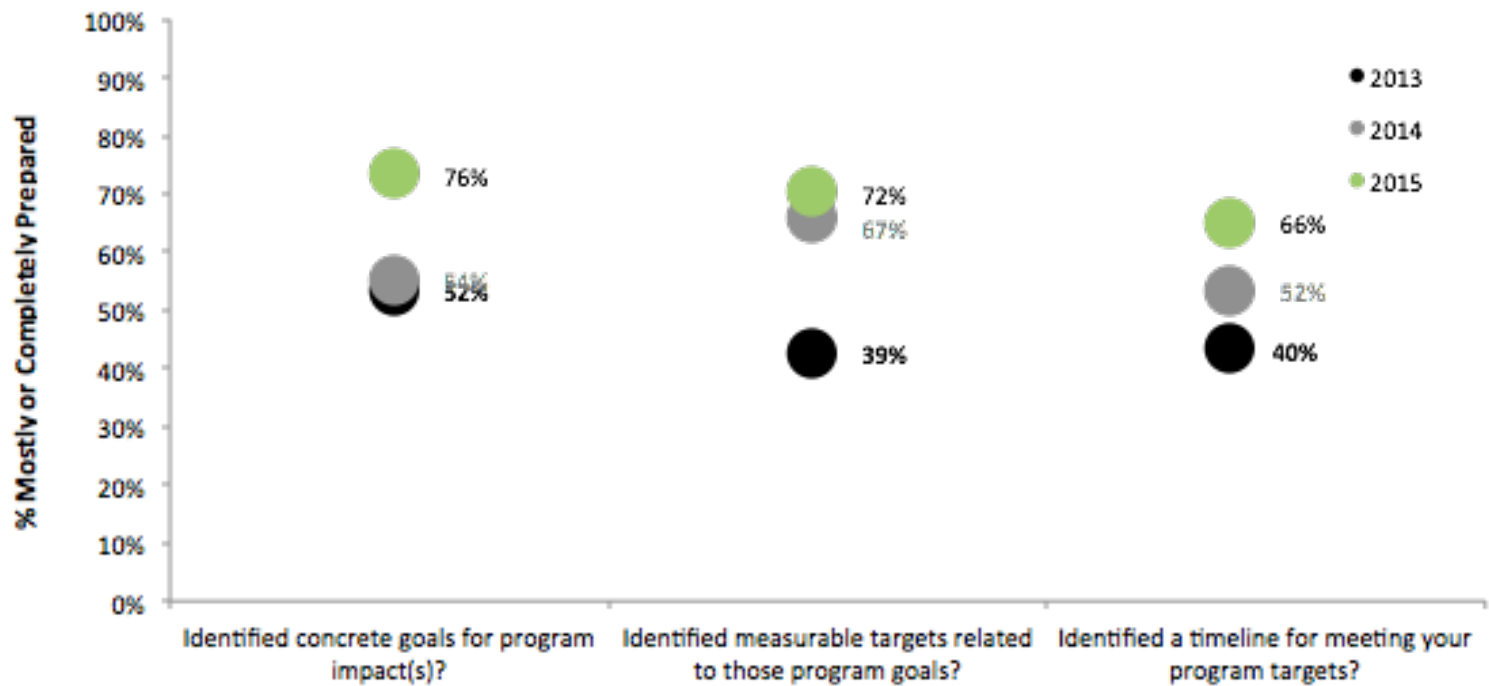
On average program leaders had implemented 4 different types of programs in the past 12 months. 58% of these are program types covered in the evaluation reports.



Conferences & hackathons continue to see increased implementation this year again. While edit-a-thons, writing contests, photo events, and GLAM also continue gains in popularity

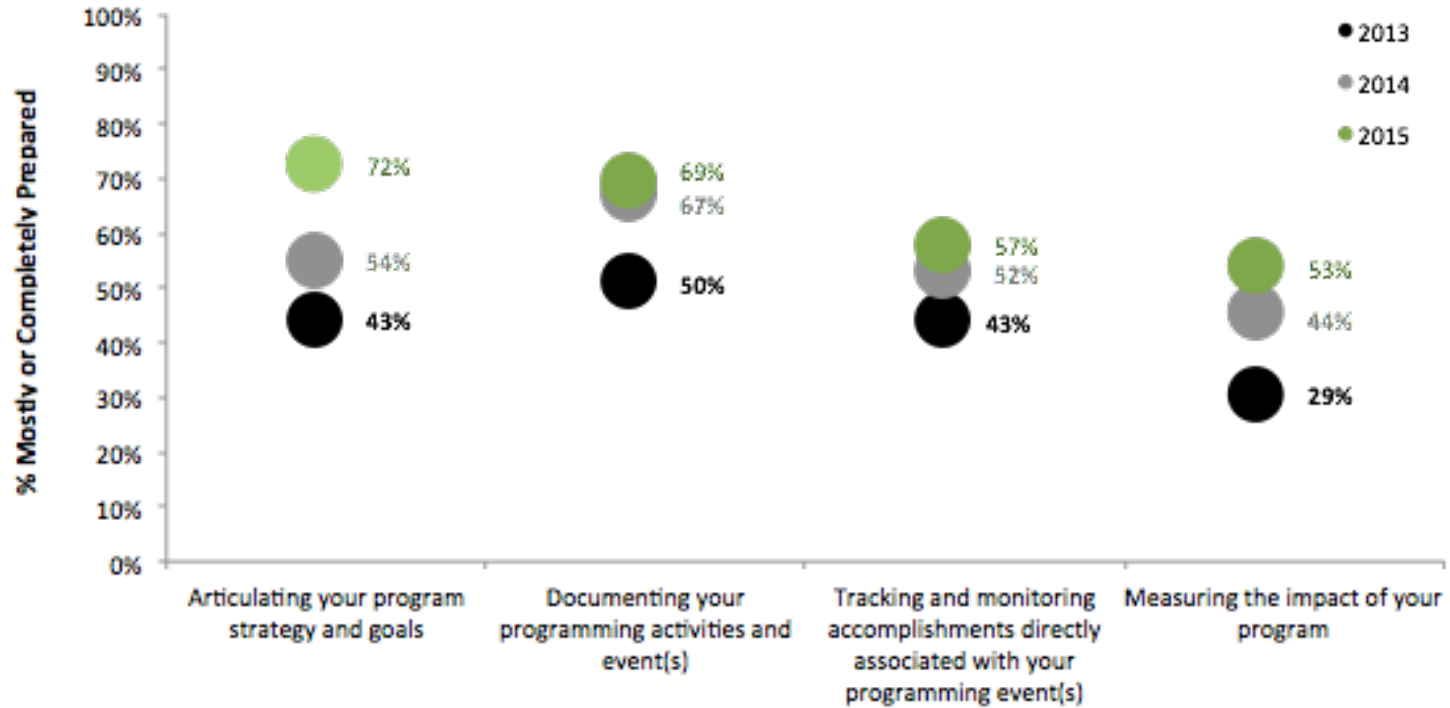
**Increased Competency in Setting and Measuring Against Targets.** Self-reported ability to set and measure against goals and targets continue to increase but may be seeing some slowed development in terms of identifying measures.

**Evaluation Pulse**  
**Self-rated Evaluation Capacity: Setting Goals & Targets**

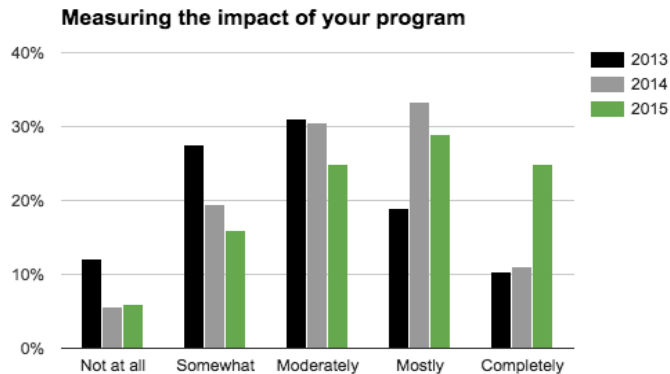
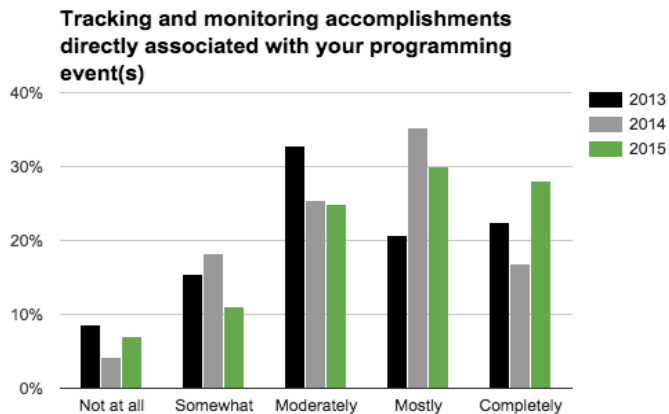
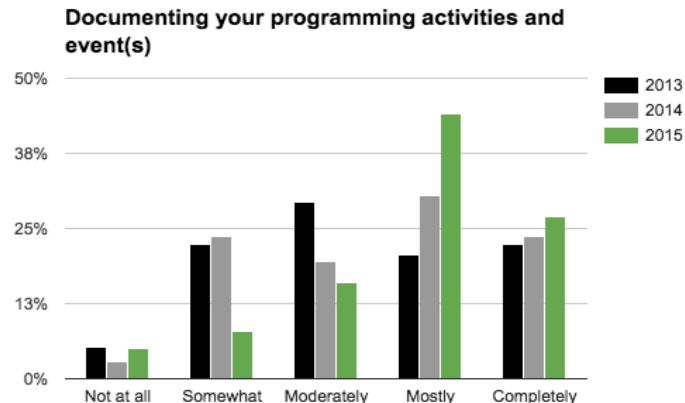
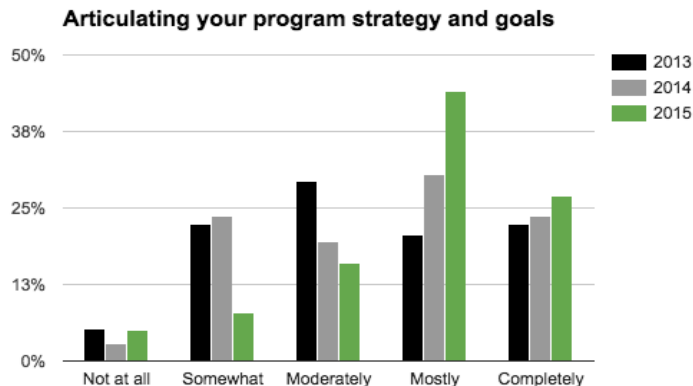


**Continued Growth in Capacity.** We continue to see development in all four areas of evaluation capacity but still have much to do in terms of tracking, monitoring, and impact measurement.

Evaluation Pulse  
Self-rated Evaluation Capacity: Evaluation Preparedness



**A Picture of Continued Success.** This year we saw some big growth as is more easily seen in the response distributions shifting toward the “completely” side over time in the charts below



## Resource Use

The most frequently used resources in the last 12 months were used by nearly half or more program leaders:

1. Program Evaluation Reports
2. Wikimedia blogs about evaluation
3. Learning Patterns
4. Program Toolkits or Resource pages
5. Wikimetrics

The resources used least were: Learning Modules and Reporting & Storytelling resources

There were also three resources with which 25% or more of program leaders were unfamiliar:

1. Wikimedia blogs about evaluation
2. Program Toolkits
3. Learning Modules

**Resource Preference.** Program leaders assigned their highest preference for learning resources and...

Assigned the highest mean rank:

1. **Pages on Meta** (2.0 mean rank)
2. **Public mailing lists** (2.4 mean rank)
3. **Case Studies** (2.4 mean rank)
4. Podcasts (2.4 mean rank)
5. **Reports** (2.5 mean rank)
6. Hangouts (2.5 mean rank)

Assigned the lowest mean rank:

1. Short Videos (2.9 mean rank)
2. Newsletter (2.9 mean rank)

Most Frequently Ranked:

1. **Pages on Meta** (21% of point distribution)
2. Reports (16% of point distribution)
3. **Public Mailing Lists** (e.g., toolkits, program reports, learning patterns) (14% of point distribution)
4. **Case Studies** (13% of point distribution)
5. Social Media (10% of point distribution)

Least frequently ranked:

1. Podcasts (2% of point distribution)
2. Hangouts (4% of point distribution)





## Consultations. Since we did not drill down in the survey this year...

*Something from [Eval Pulse 2014](#):*

**70%** of survey respondents in 2014 reported having **accessed direct consultation** with WMF team members.

Leaders most often reported consultation on:

1. Evaluation tools and resources (30%)
2. Evaluation strategy (25%)
3. Survey consultation (17%)
4. Data analysis consultation (14%)

We have since increased our rate of consultation for surveys, and for grantees evaluation strategy as well as begun consultations for storytelling.

*Something from tracking:*

As an identified workflow, we began tracking in July 2015. Since, 141 consultations have been logged, 46% of our logged engagements.

Currently, consultations have focused on:

1. Survey consultation (48%)
2. Evaluation strategy (34%)
3. Evaluation tools & resources (15%)
4. Communications & Storytelling (3%)

The other 167 engagements (54%) logged since July 2015 are program design and evaluation workshops sessions at conferences

# **Workshop Exit Survey Responses:**

**For the evaluation strategies you plan to implement what further guidance and resources will be most important for you and your program(?)**

# 2013

Tracking tools (3)

Survey strategies (2)

Tools (2)

Logic Models (2)

Accessible documentation

Analyze kiwix offline user experience with survey items

Broad discussion in the movement - for common understanding of evaluation and it's importance

Community and group discussions

Community portal

Community space to share usecase/case studies

F2F Dialogues

Follow-up group

Get community on board how to train those

Suggesting/implementing programs?

Guidance for metrics definitions

Local chapter adopts strategy

People available to answer my concerns as I go along

Poll in WLM portal

Portal with programs documentation of other groups/chapters to share ideas and learn

Strategy

Strong arguments to convince community to work with me

Teaching tools

To get image upload survey

Tools for Data Analyze

Way to speak with evaluation team when we build our programs

# 2014

Tracking Tools (9)

Community portal (7)

Survey strategies - tools and feedback (6)

High level project feedback (3)

Time to do it (2)

Participant survey items (2)

Dialogue (2)

A step-by-step here's what to do next list (2)

Would definitely get in touch with requests for help  
with relevant metrics tools that help, once I've  
identified that data collection that may help.

Wikimetrics

Translatable examples (2)

Training fellow volunteers

Tools and participation strategy (??)

Successful models

Storytelling

Simple toolkits

More usability in wiki-metrics

Metrics

Measurement tools for Wikipedia editing activities

Learning portal

Learning patterns

Knowledge base

GLAM tools

Free time

Continuous communication

# 2015

Logic models (6)

Tools (5)

Further interaction (4)

Rosemary's stress reduction strategies (2)

Application (2)

Allow participants with more time to discuss among themselves

Fewer, longer pauses

Giving more time to explain tools

Lots of info, need a better way to remember what we learn

More backfeed at the tables with an expert

More focus

More time

Using images under free license even for warm-up =)

Balance between learning/pauses

Case studies

Collaboration

Collecting Ideas and opinions

Concepts

Ease of understanding

Education extension

Examples

Learn about new tools/kits

Learning how to measure outcomes

Methodology

Openness to question

Positive energy

Practice in planning a program by logic models

Result/Solution oriented

Sticky wall

Tools rotation, fast and efficient

Wikimetrics

# **Key Performance Indicators & Dashboard Data**

**Q1 FY1516**

Former Team Name	Performance Indicator	Statistic	QoQ	YoY
<b>L&amp;E</b>	<i>Resource</i> pageviews	61,354	n/a	n/a
	<i>Portal resource</i> pageviews (unique editors)	61,354 (239)	n/a (+99%)	n/a (+149%)
	<a href="#">Learning Patterns</a> created (unique Editors)	75 (111)	+63% (XX%)	+97% (XX%)
	Community Leaders <i>engaged (in workshops)</i>	185 (100)	<i>n/a</i>	<i>n/a</i>
<b>Education</b>	Education Program Leaders engaged (countries)	187 (61)	+ 110% (+ 53%)	n/a
	Wikis using Education Extension (projects, languages)	18 (5, 16)	+ 13%	n/a
	Referrals made to other community members	43	+ 167%	n/a
	Number of Phabricator tasks claimed and (completed) by Education Collaborative members	39 (18)	n/a	n/a
<b>TWL</b>	Total count of accounts distributed (Unique recipients)	4707 (2384)	+8.4% (+5.4%)	+45% (+31%)
	Total count of global branches (Library coordinators)	11 (40)	+37% (+21-%)	+267% (+470%)
	Signup speed (unweighted avg)	27 days	n/a	n/a
	Citations added to partners** (Donation Partners)	13,383 (42)	+12.2% (+20%)	n/a (+200%)



## Education Extension.

As of 15 October 2015, the extension supports nearly 20,000 students, nearly 400 educators, and more than 230 Wikimedians throughout the movement.

Their work is overseen by nearly 40 project administrators. This extension supports power users and new users alike, and it has done so for almost half a decade.<sup>[1]</sup>

Installations: 19  
Wikimedia projects: 5  
Languages: 17  
Institutions: 437  
Courses: 996  
Students: 18,397  
Instructors: 386  
Coordinators: 104  
Online volunteers: 171  
Campus volunteers: 230  
Administrators: 38

# Other Relevant Resources.

[OpenGLAM Benchmark Survey](#)  
[OpenGLAM Benchmark Study](#)  
[Plan](#)

The Former  
“Learning & Evaluation”  
Team

# Opportunities / Game Changers

What: **Learning - Community of Practice - Peer-to-peer**

Why It's a Game Changer / Impactful:

Peer-to-peer learning is already taking place in the movement in an informal way thanks to our early focus on providing learning opportunities via conferences, toolkits and events to committed community leaders. This project will step-up and commit resources to recruitment, coordination, training and recognition of robust Communities of Practice. It's a game changer for sustainability. Moving from WMF Staff serving as Experts to developing Faculty/Peer Mentors around core areas of impact in each region. This would also support a regional conference strategy planned.

Major Hurdles to Overcome:

- Mentoring/Faculty Infrastructure and model. Shifting from Conference Investment to Selection, Training and Support to Regional Leaders.
- Investment in Faculty Portal, Training, Support, Connection with Conference Model

**Expected Impact**  
(1-5, 5 is highest)

5

**Expected Effort**  
(1-5, 5 is highest)

3

# Opportunities / Game Changers

**What:** **Impact: Accelerate Wikimedia Growth and impact through collaborative engagement in defining and building toward collective movement impact and shared best practices** ([see also](#))

To include: Co-created definition, collaborative assessment, and measurement tools and resources for contributor engagement, programmatic and partnership work as well as a tool for improved supporting grantees. (To be launched at Wikimedia Berlin 2016). Potential roll-up on Global Impact of WMF (See [Example](#) -- to support Global Brand and Partnerships).

## Why It's a Game Changer / Impactful:

Co-created tools, resources and definitions developed by community vs WMF staff analysis/expertise insures greater adoption and proficiency of impact practices by local communities. Assessment tools and frameworks provide backbone for peer to peer mentoring, grantmaking insuring both sustainability and community ownership.

## Major Hurdles to Overcome:

- Trust as helpful co-created resource for impact vs. test
- Recruiting and maintaining global community owners and contributors/owners of this Work.
- Tools have inclusion of local context
- Data access issues (in the works)

**Expected Impact**  
(1-5, 5 is highest)

5

**Expected Effort**  
(1-5, 5 is highest)

3

# Opportunities / Game Changers

**What: Knowledge Management: Tools, Technology & Shared/Collective Knowledge Management**  
(i.e., Move from search to find ..Technology connecting People to People and People to Content )

Imagine volunteer leaders who contribute as much or more to movement learning and practices as they contribute to Wikimedia Projects? Using what we have learned to date from Program Reports and Toolkits, user data, and successful exchange areas such as the village pump, we will leverage technology and our developer community for increased findability contribution and value of shared community learning (Examples: ASKbot, translation)

## Major Hurdles to Overcome:

- Design and coding technical expertise, program leader fatigue, aversion to changing knowledge management structure.
- It's not just technology, it's a culture of knowledge sharing which should come naturally to our community but taxes limited volunteer time for contributions.

**Expected Impact**  
(1-5, 5 is highest)

4

**Expected Effort**  
(1-5, 5 is highest)

5

# Opportunities / Game Changers

## What: **Community Insights /Voice**

System of surveys for learning and listening to needs of communities for improved decision-making both at WMF and local community levels. (Including Snap-Shot scorecards for 2016-2017 annual planning)

## Why It's a Game Changer / Impactful:

- Improved volunteer and partner engagement with Wikimedia Foundation and projects
- Community voice as core to the work we do at all levels.
- Build capacity for community listening using surveys across wikimedia projects and programs
- Accountability in year-to-year progress and input on strategy & products).(Co-created with research, and input from departments) Published as part of annual plan.

## Major Hurdles to Overcome:

- Internationalizing surveys; creating global hubs for surveys
- Building a network of experts to sustain high quality work

## Expected Impact

(1-5, 5 is highest)

5

## Expected Effort

(1-5, 5 is highest)

3

The Former  
“Wikipedia Education  
Program” Team



# Opportunities / Game Changers

**What:** Professional development for Collab members and other involved program leaders

## Why It's a Game Changer / Impactful:

- Creates a more solid network of global leaders
- Builds human capital of promising community members (our most valuable resource!)

## Major Hurdles to Overcome:

- Currently no established systems or channels for this
- Staffing / expertise shortage

**Expected Impact**  
(1-5, 5 is highest)

5

**Expected Effort**  
(1-5, 5 is highest)

3

# Opportunities / Game Changers

**What:** [Programs and Events Dashboard](#), with [Wikimetrics integration](#), a [project page wizard](#), and a [commenting tool](#) for providing feedback on new users' work

## Why It's a Game Changer / Impactful:

- Major time saver for community members in project managing and tracking
- Easier entry point for educators who are not used to working on wiki

## Major Hurdles to Overcome:

- Lack of dedicated tech staff
- Lack of budget

**Expected Impact**  
(1-5, 5 is highest)

5

**Expected Effort**  
(1-5, 5 is highest)

4

# Opportunities / Game Changers

**What:** Close involvement in Ministry of Education conversations to push government-level Wikipedia awareness

## Why It's a Game Changer / Impactful:

- WMF's presence can open doors that local affiliates have trouble opening themselves, especially in hierarchically oriented societies
- Immense scaling opportunity!

## Major Hurdles to Overcome:

- Current staffing / expertise shortage
- Need to make sure communities are ready to take on possibly large amounts of extra work
- Caution around WMF "lobbying foreign governments" - needs further conversation

**Expected Impact**  
(1-5, 5 is highest)

4

**Expected Effort**  
(1-5, 5 is highest)

3

# Opportunity / Game Changer

What: **Partner with movement-aligned organizations**

## Why It's a Game Changer / Impactful:

- Increasing our reach / impact through partners' established networks
- Making sure people re-use our content with respect for our brand and values

## Major Hurdles to Overcome:

- Staffing shortage

**Expected Impact**  
(1-5, 5 is highest)

4

**Expected Effort**  
(1-5, 5 is highest)

3

The Former  
“The Wikipedia Library”  
Team

# Opportunities / Game Changers

**What:** Build library card platform for all editors (and even readers)

**Why It's a Game Changer / Impactful:** Most volunteer and staff time is in distributing access to resources and communicating resources. A number of missed access opportunities are because of multiple manual steps in our processes. Tracking is poor for same reasons.

**Major Hurdles to Overcome:**

- Need someone to manage the technical elements
- Need funding to develop platform that combines existing tools (such as discovery layers), with our unique situation: globally distributed editors and a readership

**Expected Impact**  
(1-5, 5 is highest)

5

**Expected Effort**  
(1-5, 5 is highest)

4

# Opportunities / Game Changers

**What:** Build program capacity and knowledge sharing across global branches

**Why It's a Game Changer / Impactful:** We are just beginning to see growth of branches as static portals offering 1-2 services supported by volunteers. How do we ensure that we get each language community the support it needs, in a way that is meaningful in that language?

**Major Hurdles to Overcome:**

- Building sufficient volunteer interest, understanding and capacity -> volunteer timelines don't operate on our timelines, and we need to ensure communication among existing volunteers
- Identify existing models of activity that take advantage of the strengths of smaller language communities

**Expected Impact**  
(1-5, 5 is highest)

4

**Expected Effort**  
(1-5, 5 is highest)

3

# Opportunities / Game Changers

**What:** **Transition to free to read *for readers not just editors***

**Why It's a Game Changer / Impactful:** Wikipedia is a powerful place to start research, but right now there is not an advantage for people to start here . Also, any major wins for Wikipedia readers will create headway for Open Access community - highly motivated, and potential contributors to our movement.

**Major Hurdles to Overcome:**

- Creating effective business models, that don't just get us "in bed" with the existing publishing infrastructure (as critiqued with Elsevier) or fall apart when Wikipedia's readership floods service -- already some positive signs from Newspapers.com and JSTOR
- Not asking for too much from publishers, already beginning to ask for unlimited editor accounts

**Expected Impact**  
(1-5, 5 is highest)

5

**Expected Effort**  
(1-5, 5 is highest)

4/3



# Opportunities / Game Changers

**What:** **Improve reader research literacy**

**Why It's a Game Changer / Impactful:** Most of the recent studies/information about declining readership and why Wikipedia isn't expanding in new markets, points to fundamental illiteracies around Wikipedia (credibility/reliability, contribution process, etc). There is an established body of scholarship in libraries, and conversation within Wikimedia communities, on how to use Wikipedia in research processes, but it is highly inconsistent and not community inflected.

**Major Hurdles to Overcome:**

- Possible community resistance to or disinterest in reader focused education in article space
- Ensuring that this information meets a wide range of cultural/knowledge needs, and empowers experts to teach/share information

**Expected Impact**  
(1-5, 5 is highest)



**Expected Effort**  
(1-5, 5 is highest)



# Opportunities / Game Changers

**What:** Continue novel partnerships involving Engaged Experts, WIRs, GLAMS

**Why It's a Game Changer / Impactful:** Lots of locally-impactful exciting models in Wikimedia communities and our contact with publishers and libraries has created some neat opportunities- but don't have resources to scale/advise beyond pilots and documentation.

**Major Hurdles to Overcome:**

- Underresourced to support this kind of work at Foundation - needing at least someone for GLAM-Wiki expertise, if not also surfacing the best practice in STEM or OA engagement
- Not a high priority when our largest expertise/network is in the libraries and reference space, which means research questions are much more scalable and in our focus

**Expected Impact**  
(1-5, 5 is highest)

5

**Expected Effort**  
(1-5, 5 is highest)

4

# Opportunities / Game Changers

**What:** **Involve national and global library bodies**

**Why It's a Game Changer / Impactful:** Librarians/Archivists are already some of the most impactful GLAM-Wiki participants; however, these activities tend to be sporadic at best, unless given some type of institutional validation/strategy (see Catalan Library Network Case study). Moreover GLAM-Wiki doesn't always harness strongest skills (literacy education, reference desk support, etc)

**Major Hurdles to Overcome:**

- Staying at a scale that doesn't infringe on the local efforts of local Wikimedia communities, but also models viable strategies that can be adapted at different scales.
- Ensuring that the strategies adopted by international bodies feed the already existing communities, rather than creating efforts that work in conflict.

**Expected Impact**  
(1-5, 5 is highest)

4

**Expected Effort**  
(1-5, 5 is highest)

3

# Opportunities / Game Changers

**What:** Bring in tens of thousands of librarians through education campaigns w/ partners

**Why It's a Game Changer / Impactful:** Librarians are experts in Research, References, and Technical infrastructure to support them (like structured source metadata and baking Wikipedia into library tools). Librarians are also very effective GLAM and Education program ambassadors.

**Major Hurdles to Overcome:**

- Scalably empowering local volunteers and potential partner organizations in the efforts, rather than centralizing the activity
- Harnessing the most needed skills for strategic impact (expertise in library tech, structured metadata and GLAM/EDU outreach), while also getting them involved at basic activities (editing)

**Expected Impact**  
(1-5, 5 is highest)

5

**Expected Effort**  
(1-5, 5 is highest)

4

# A New Call: Affiliate Partnerships

Not shared during retreat due to unscheduled  
time constraints.

# Opportunities / Game Changers

## What: **Improved Engagement Processes for Affiliates and foundation staff**

- 1) Technical Support & Organizational Development for Affiliates - Welcome kits and regular contact system for affiliates
- 2) Re-imagined Site visit to include technical consultations and support and tools most needed for leadership development and impact.
- 3) Wikimedia Foundation - Training and Onboarding on Community for all Staff. (Syncing welcome kits with HR)

## Why It's a Game Changer / Impactful:

- Technical consultation by WMF staff came up in most recent community consultation as high priority.
- Pro-active engagement and resource connections is a critical step to organizational trust building and collaborations.
- While particular WMF staff have developed "individual trust" with community members it does not extend to the WMF organization. Instilling best practices with intensive training in community engagement makes all of us WMF Ambassadors.

## Major Hurdles to Overcome:

- Coordination with HR as required training including regular onboarding calendar. Commitment by C Suite.
- Cross Functional Collaboration and content expertise and review by subject matter experts.
- Re-imagine current site visits to include consultation in organizational development impact/beyond grants review--Strong partnership between Resources and PC & L

**Expected Impact**  
(1-5, 5 is highest)

5

**Expected Effort**  
(1-5, 5 is highest)

3

# Opportunities / Game Changers

## What: **Affiliate CRM, Knowledge Repository & Support**

- 1) **AffCom Reimagined:** Empower the committee as an advisory group to assess affiliate needs and help define needed supports including (potential role in peer mentoring system).
- 2) **Affiliate Knowledge Repository and Contact Plan:** Curation of what we know about communities into a WMF repository and pro-active contact system by C-Suite, CE to learn about and best support affiliates.

## Why It's a Game Changer / Impactful:

- Under their new structure AffCom can serve as a key cabinet /advisory group to affiliate development and potentially serve as peer mentors. As we accelerate peer mentoring, this group could be a key asset.
- WMF is vulnerable from a Knowledge Management perspective, with only a few individuals in the organization maintaining the keys to information about history, affiliate needs & development. Departure of long-term employees this year and lack of documentation of country visits has reinforced this vulnerability. A regular pro-active contact plan, curation of existing knowledge (Asaf/Grants/Lila downloads for example) will help us improve quality of individual interventions and provide more meaningful support to affiliates.
- A single oracle of knowledge is no longer sustainable and inhibits trust-building.

## Major Hurdles to Overcome:

- Use of and discipline to contribute to and update repository/contact system
- Need to jump-start this in announcement with AffCom
- Multiple CRM's in use! aargh

**Expected Impact**  
(1-5, 5 is highest)

4

**Expected Effort**  
(1-5, 5 is highest)

5

# Opportunities / Game Changers

What: **COMMUNICATIONS ROADMAP FOR AFFILIATE ENGAGEMENT and EVENTS**

## Why It's a Game Changer / Impactful:

- A Communications Roadmap will map affiliate communications grounded in an annual scorecard of WMF products, services and supports. This scorecard will demonstrate transparency and accountability by WMF and serve as a key point of data for annual planning.
- This would be a major trust builder as we ask community to evaluate how we are doing and identify the products, services and support most needed on a consistent basis -- before the annual plan) (*See Community Voice and Insights*).
- The roadmap will also identify improvements in problematic areas such as fundraising banners and support increased impact from in-person conferences. Identify scheduling conflicts with consultations, etc..

## Major Hurdles:

- We help guide this work, but we alone don't own it.
- Collaboration with Comms, Fundraising, and other teams in CE.
- The Scorecard is big and has risks but much rewards!

**Expected Impact**  
(1-5, 5 is highest)

5

**Expected Effort**  
(1-5, 5 is highest)

2/3