

# Operations Tuning Session Q3 FY20-21



**WIKIMEDIA**  
FOUNDATION

# Efficacy & Resilience OKRs



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# Operations



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# Centralized Ticketing System



## Objective:

To standardize the manner in which services are offered to staff, to provide consistent workflows for issue resolution, reduced response times, improved communication and automatic routing to ensure correct teams are engaged.

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## Overview

- Standardized Zendesk services across 2 existing teams - IT Services (ITS) and Advancement
- Implemented Zendesk across 7 teams - Legal, Trust & Safety, People Ops, Learning & Development, Recruiting and Continuous Process Improvement (CPI)

## Impacts

- **Improved efficiencies:** Better visibility into requests, improved support, and faster turnaround times.
- **Increased privacy:** Use of a layered approach to ensure privacy. Separate instances, assigned roles, and specific views within the tool prevent teams from sharing confidential information.
- **Enhanced tracking and follow-through:** Ticket wait times are now trackable enabling response timing improvements
- **Improved reporting:** Using the upgraded reporting tool provides a standardized approach to data collection.
- **Single contract with MSA:** Each team that used Zendesk had their own contract, and price point for each product. Through this engagement, prices were reduced and standardized across all teams for 3-years.

# Centralized Ticketing System



## Key Results

	Year Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
(Q2) Convert ITS to Legacy Enterprise product (Q3) Create, configure and build 4 instances (Q3) Add 7 teams to the new instances <b>Baseline:</b> 1 team using Zendesk Legacy Enterprise	7 new teams using Zendesk	-	Converted ITS to Legacy Enterprise	4 instances completed 7 teams went live on Zendesk	-



# Sustainability



## Objective:

### Advance towards carbon neutrality

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A host of activities were completed during the third quarter for Sustainability:

We performed our **environmental impact survey** and completed data collection for our **annual carbon footprint assessment**. The survey helps us gauge attitudes and awareness of sustainability amongst staff, and quantify the environmental impact of Foundation operations and Community convening events.

Continuing our efforts to broaden the reach of sustainability discourse, we hosted our second live event open to the public with environmentalist **Louise Mabulo** and Wikimedian and Farm Forward advocate **Vanj Padilla**. The interview focused on **sustainable agriculture** that includes local food production, climate change mitigation and the relationship to broader information ecosystems.

Additionally, we hosted an **editathon** focused on the the topic of sustainable agriculture and climate change justice, and provide training **for new editors**.

**Target quarter for completion:** Ongoing

# Sustainability



## Key Results

	Year Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
Deliver strategic programming to reduce our carbon output by 1% (Q1-Q4) <b>Baseline:</b> 2,430.69 tCO2-eq	1% footprint reduction	Partnership exploration underway	100% footprint offset	-	-
Identify mission-aligned offsets to advance carbon removal <b>Baseline:</b> No offsets identified	Offset program activated	Offset potential identified, pending scenario	Offset partnership established and completed	-	-



# Community Events



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# Community Events



## Objective:

**Develop a thriving ecosystem of movement events to advance community building, collaboration and capacity development**

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### Wikimania

The **Wikimania Steering Committee** engaged in a series of Event Design sprints that were kicked off and facilitated by the Foundation and supported by Event Design experts. One of the **goals** of these sprints was to collaboratively explore **different formats for a virtual Wikimania** experience.

As an outcome **three different formats** for a Virtual Wikimania were designed. We collaborated with the WMSC to inform, engage and involve the wider community. We did this by **publishing** the details of the **design process and the potential formats**, and distributed a **call for volunteer participation** to form the 2021 Wikimania **Core Organizing Team (COT)**. Out of more than 150+ applications, a total of **9 individuals** have been selected by the WMSC to form the COT.

The COT has been onboarded and has already started making important decisions; An event date for **Wikimania 2021**, has been selected: **August 13-17**. And a prototype -" Around the World" - has been selected as a starting point for event production. A **save the date** and more details are scheduled to be shared with the wider community shortly.

**Target quarter for completion:** Ongoing

# Community Events



## Objective:

**Develop a thriving ecosystem of movement events to advance community building, collaboration and capacity development**

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### Community events

In Q3 we worked with community organizers on proposal for events taking place in the second half of 2021. We funded Queering Wikipedia (\$ 26,524.66 repurposing funding from canceled 2020 in person conference) off round, and are in final approvals with Wiki Conference North America, and Wiki Conference Seoul. We are in discussion with three other organizing teams and working on assessing and rescoping their event proposals. These will not be included in round 2, but may be approved off round in Q4. Additionally, we continue to leave flexibility for funding strong remote event proposals off-round in Q4 as they come up.

We are continuing to focus on increasing the collaboration and engagement practices with the Wikimedia community. Our **monthly Team Office Hours** continue to grow and evolve, the new **Events Portal** is complete, and we have a new **Participation Accessibility Toolkit** in place. We have simplified **Reporting Requirements** for our conference grants program grantees and will begin working on simplifying our **Application Requirements** in the coming quarter. Ongoing work includes efforts around our **Capacity Building** and community training project, **Global Events Calendar**, a **Facilitation Training Series**, our **Resource Translation Project**, and a **Newcomers strategy**.

**Target quarter for completion:** Ongoing

# Community Events



## Key Results

	Year Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
<p>KR1: Perform a strategic mapping analysis to surface opportunities for improvement, resulting in a refined and shared understanding of our ecosystem of movement events (Q1)</p> <p><b>Baseline:</b> No existing analysis</p>	Analysis completed and programmatic pipeline developed	Analysis underway	Analysis completed, pipeline developed and activated	-	-
<p>KR2: Develop a risk protocol to identify and mitigate vulnerabilities that could impede the safety of our movement event participants (Q2)</p> <p><b>Baseline:</b> No existing protocol</p>	Implemented protocol	Risk protocol implemented	-	Evaluation survey implemented	-
<p>KR3: Fund a minimum of 10 event proposals to advance community building, collaboration and capacity development (Q2-Q4)</p> <p><b>Baseline:</b> 0 events funded</p>	10 events funded	-	2 proposals funded	1 proposal funded (off-round)	-

# Global Data & Insights



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# Foundation Data & Insights



## Objective:

**Improve the effectiveness and equity of Foundation-led programs and events by collecting, and reporting data to evaluate programs so leaders have insights to shape planning and funding decisions.**

We are building and implementing systems for measuring the social impact of the Foundation's work.

**Grants Data Architecture:** To gain a better picture of the impact of grants programs, we are working to streamline the process and methods for receiving grants applications and looking at how to improve the reporting that comes out of the grants database management system.

**Dashboards:** We are hiring a short-term dashboarding consultant to help build dashboards on equity pilot projects in Q4.

**Events:** Due to COVID, we are evaluating no events this fiscal year, though we have worked with the events team to develop a toolkit that can be used to evaluate all future movement events.



Department:

# Foundation Data & Insights



## Key Results

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
Q2: Finalize Foundation NPS-proxy measure <b>Q3: Report out on NPS to C-team</b> Baseline: 0% complete	100%	0%	40%	40%	-
Q1: Lead workshops to socialize available data, choose dashboard platform <b>Q2: Amplify available data to decision-makers</b> <b>Q3: Lead workshops to socialize dashboards, launch public geo index</b> Q4: <del>Share public equity dashboard</del> , Launch affiliates and language dashboard integrations Baseline: 0% complete	100%	17% (8% delay)	-	54% (8% delay)	-
Q1: Form a Community of Practice for Foundation analysts <b>Q2: Select and launch an improvement project for the CoP</b> Q3: Implementation of CoP improvement project Q4: Wrap-up improvement project Baseline: 0% complete	100%	0% (25% delay)	5%	Paused	-
Q1: Build events evaluation toolkit; evaluate GLOW; final report for Wikimania 2019 Q2: Finalize events toolkit, clean and report on historical grant metrics <b>Q3: Implement new evaluation framework on any major in-person event, assess and scope potential improvements to grants data collection processes</b> Q4: Work with vendors to setup Grantee Data Portal and share public grant data to meta Baseline: 0% complete	100%	18% (4% delay)	46% (4% on hold)	86%	-

# Movement Data & Insights



## Objective:

**Collect, analyze, and share data on the demographics, needs, and experiences of movement participants to inform ongoing decision making and determine whether we are meeting Foundation goals related to a thriving movement**

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**Affiliates Data Survey:** In Q3, we completed cleaning both the organizational and membership survey data sets, as we prepare to analyse and publish the report of our findings in Q4.

**Affiliate evaluation system:** We completed the cross-department/team alignment on affiliates' annual reporting templates to help affiliates standardize the way they report their impact. We have begun to mine data from affiliate annual report as part of our affiliate impact evaluation.

**Target quarter for completion:** Q4 FY20-21



# Movement Data & Insights



## Objective:

**Collect, analyze, and share data on the demographics, needs, and experiences of movement participants to inform ongoing decision making and determine whether we are meeting Foundation goals related to a thriving movement so that ultimately, we can create a more equitable movement.**

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**Community Insights Survey:** We presented key findings to 7 teams at the Foundation, and we are currently drafting and revising both the main report (for a May release) and a supplement on changes in our editors' social environment.

**Equity Index Project:** The Equity Index project includes metrics and customized dashboards by teams to identify investment and partnership opportunities in the context of global equity and development indicators.

The first pilots of the Wikimedia movement engagement metrics were completed in Q3 with four teams from across 3 departments as well as within the Emerging Markets data sprint and Summit. In addition to piloting the initial metrics, we launched the mock-up of the languages version and worked to integrate gender data to build gender equity metrics for pilot 2 which will launch mid Q4. We have remained on pause with initial dashboard development as we seek contractor support.

**Target quarter for completion:** Q4 FY20-21



Department: Operations

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# Movement Data & Insights



## Key Results

Q1: Refine CI survey and launch, analyze affiliate user contributions and socialize data to AffCom, build equity landscape data with grants metrics and language-based analysis  
 Q2: Close CI survey and clean data; revise and launch Affiliate survey and socialize to AffCom; develop equity language mock-up  
**Q3: CI data analyzed and presented for annual planning; 2021 affiliate survey launched; equity database updated with 2020 data**  
 Q4: 2020 survey presented to staff and communities, 2021 CI survey revised; affiliate data analyzed; CI data added to equity database and ~~public equity landscape shared~~

**Baseline:** 0% complete

Provide one data report per quarter about the Wikimedia Movement to Foundation staff

**Baseline:** No reports released

Q1: Upgrade affiliate data portal and create evaluation rubric  
 Q2: Automate affiliate reporting  
**Q3-4: Develop advanced query form and scale feedback system**

**Baseline:** 0% complete

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
	100%	36%	59%	86%	-
	4 reports	2* reports	3 reports	1 data report	-
	100%	21%	37%	64%	-



# All Hands



## Objective:

**Assemble staff to celebrate successes, collaborate on work deliverables, and have fun**

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## Overview:

**New dates secured:** June 15, 16, 17

**Platform:** Confirmed and running through approval process

**Theme:** *“Wish you were here”* which embraces our remote experience while connecting with our 20th Birthday celebrations

**Swag:** Choice of top 4 products - 1 Hoodie and 3 crewnecks; working with vendor for samples

## Content:

- Lightning talks: 18 topics
- Workshops: 12 topics
- Local talent: 12 artists
- Keynote speakers: in progress

## Next steps:

- Online experiences
- Keynote speakers
- Increased Foundation communications
- Continue to gather more content
- Submit pre-recorded content

**Target quarter for completion:** Q4 FY20-21

# Appendix



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# Acronyms

**CI** (Community Insights)

**tCO<sub>2</sub>-eq** (total carbon dioxide equivalent): a metric measure used to compare the emissions from various greenhouse gases on the basis of their global-warming potential

**SLA** (Service Level Agreement): timelines, quality levels, and responsibilities that are agreed to between departments

**SOP** (Standard Operating Procedure): step-by-step instructions used to help create department configurations

**WAD** (Wikimedia affiliates data): Referring to the Wikimedia affiliates' data portal

