

# Designing SMART Proposals and Annual Plans

Wikimedia Conference 2015

- 1. Annual Plans: Challenges & Benefits**
- 2. Begin with community**
- 3. Setting goals**
- 4. I've got questions...**
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- 6. Wrap-up**

# 1. Annual Plans: Challenges & Benefits

What is challenging about creating good goals and metrics?

What is challenging about creating an annual plan?

What are the benefits of an annual plan?

## 2. Begin with community



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## 2. Begin with community

Understanding...

needs  
interests  
capacity  
leadership

How...

survey  
on-wiki planning pages  
mailing lists  
social media  
in-person meetings

## 2. Begin with community

### Capacity

**WM Ukraine:** [https://meta.wikimedia.org/wiki/Grants:PEG/WM\\_UA/Programs\\_in\\_Ukraine\\_2014#Resources](https://meta.wikimedia.org/wiki/Grants:PEG/WM_UA/Programs_in_Ukraine_2014#Resources)

**WM Armenia:** [https://meta.wikimedia.org/wiki/Grants:PEG/WM\\_AM/2014#Resources\\_and\\_Risks](https://meta.wikimedia.org/wiki/Grants:PEG/WM_AM/2014#Resources_and_Risks)

### Notification

**WM US-DC:** [https://meta.wikimedia.org/wiki/Grants:PEG/WM\\_US-DC/Projects\\_2015#Community\\_notification](https://meta.wikimedia.org/wiki/Grants:PEG/WM_US-DC/Projects_2015#Community_notification)

# 3. Setting goals

## Why have goals?

- Explain what you hope to change
- Improve program design
- Create transparency of efforts and results
- Promote shared learning
- Provide accountability to funders and others

## 3. Setting goals

**Define the Goal:** Broad statement of the desired situation.

**Examples:**

Recruit new contributors.

Retain existing contributors.

Increase the diversity of contributors.

Increase quality content on Wikipedia.



### 3. Setting goals

**Set the Objective:** Guidelines for accomplishing your goal.

Who/what will change?

How will it change?

How much will it change?

How will the change be measured?

When will the changes happen?

# 3. Setting goals

**Goal:** Recruiting new contributors

**Program:** Series of 3 editing workshops

**Example objective:**

70% of participants will make at least five edits to Wikimedia projects within one month of the editing workshop.

### 3. Setting goals : SMART process

**S**pecific

**M**easurable

**A**chievable

**R**elevant

**T**ime-bound

### 3. Setting goals : SMART process

**Specific.** Clearly state the issue, the target group, the time and place of the program.

**Goal: Train existing editors to bring in new editors.**

**Unspecific:** *The program will increase the number of new editors contributing to Wikipedia.*

**Specific:** *50 active editors will participate in a train the trainers program in the next six months.*

### 3. Setting goals : SMART process

**Measurable.** Be clear about what will be changed and by how much. Setting this clearly at the start makes it easier to evaluate.

**Goal: To support activities that ensure our offline events are ‘friendly’ spaces that welcome and encourage new editors**

**Non-measurable:** *To raise awareness of our friendly space policy.*

**Measurable:** *Increase community members support for the friendly space policy to 50%, and significantly increase satisfaction with our events, as demonstrated in responses on the annual community survey.*

### 3. Setting goals : SMART process

**Achievable.** Be realistic about what the program can achieve in terms of the scale/scope of what is being done, the time and resources available.

**Goal:** To increase the quality of information by providing free access to the best available reference resources to Wikimedia Armenia community members.

**Unrealistic:** *500 editors receiving access to The Wikipedia Library will double their productivity on Wikipedia.*

**Realistic:** *The majority of the 500 editors receiving access to The Wikipedia Library will report adding key references to 5 or more articles during their first month of access .*

### 3. Setting goals : SMART process

**Relevant.** Objectives should be relevant to the goal and your program activities.

**Goal: To work with students in schools to produce high quality images to contribute to Wikimedia.**

Not relevant: *The majority of students will rate Wikimedia as cool.*

More relevant: *75 to 100 new valued images will be added to Commons by participating students by December 2015.*

### 3. Setting goals : SMART process

**Time-bound.** Be clear about the timeframe in which the program, as well as expected changes, will take place.

**Goal: To develop a Wikipedia Education Program in school systems in order to access new contributors of quality information.**

Not time-bound: *Recruit at least five classrooms (5 teachers and 95 students) who contribute to Wikipedia as part of their participation in a pilot program.*

Time-bound: *Recruit at least five classrooms (5 teachers and 95 students) who contribute to Wikipedia as part of their participation in a pilot program by **September 2015**.*



# Common Questions

## 4. Common questions

When are we ready to write an annual plan?

1. When you know what programs work and which don't.
2. When you have a reliable group of offline volunteers and program leaders to deliver on your proposed programs.

## 4. Common questions

What is the timeline for creating an annual plan?

Annual plans take lots of time!

- Community engagement & feedback
- Coordination with the board & program leaders
- Drafting and revising the plan

Start at least 3 months before you'll need funding.

Project & Event Grants: 6-8 weeks for committee review → funding

## 4. Common questions

How do we know what metrics are appropriate for our programs?

Check out these resources!

1. Refer to the SMART process
2. Evaluation Portal: [Evaluation reports](#), [Learning Patterns](#), [Program resources](#)
3. Review similar [grant reports](#)
4. Connect with other program leaders
5. Ask WMF staff

## 4. Common questions

Can we experiment with new programs in an annual plan?

Yes!

Annual plans focus on growth -- known programs with impact -- but there is room for experimentation and taking risks.

## 4. Common questions

How do we budget for an annual plan?

1. EXPERIENCE
2. Compare costs
3. Give yourself a little cushion (~10%)

## 4. Common questions

What if our plans change throughout the year?

That's ok!

Plans change.

- Notify your community/board early on to figure out alternatives.
- Program officers can approve grant changes to programs/budgets.

## 5. Group Exercise

1. Get in groups of 4-6
2. Pick a role: grant seeker, committee member, community member, WMF staff
3. Review an annual plan
4. Write down key takeaways
  - Strengths
  - Weaknesses -- what info is missing?
  - Are the goals SMART?



**Wrap-up**