

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...**
- 5. Group exercise**
- 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



Albertus Aditya, CC BY-SA 4.0, via Wikimedia Commons (Wiki ID - Indonesia)

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

WM Armenia: 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

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

Specific

Measurable

Achievable

Relevant

Time-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