

Wikimedia Movement capacity building for organizational effectiveness

Analysis of aggregate questionnaire findings

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Introduction and methodology

What do we mean by organizational effectiveness?

When we say **organizational effectiveness**, we are looking at how well organizations are achieving impact for the movement.

This means that organizational effectiveness includes all the things that make an organization good at what it does, from strong leadership and systems, to how an organization chooses and does programs that lead to results.

In this work, we are looking specifically at groups and organizations rather than individual volunteers, so we can understand how volunteers (and staff) work together when they are part of a group or organization.

Why launch this conversation?

This work can launch a broader conversation in our movement around how organizations and groups can achieve the best results. This is a channel for organizations and groups to work together and learn from one another, regardless of organization type, organization focus, budget size, or funding stream.

We can gain a better understanding of what organizations and groups bring to the movement and how. We can also understand what makes some organizations and groups particularly effective, and learn from those organizations and groups.

Finally, we can gain a better understanding about where we need to work together to become more effective.

Project Phases

- **Phase I:** Benchmarking research to put our work in context.
- **Phase II:** An **organization effectiveness tool** for groups and organizations in the Wikimedia movement.
 - To help identify strengths and gaps in capacity, for organizations and groups.
 - To provide a structured process for building capacity, for organizations and groups.
- **Phase III:** Launch a discussion about the future of organizational effectiveness in the movement.

Consultation

Phase II: OE tool

Pilot phase

Impact survey

- How do organizations understand impact?
- What strategies lead organizations to impact?

Case studies

- How do specific organizations achieve impact in their contexts, with the resources they have?

Tool

- Assessing capacity across different strategies

Learning center

- Resources for working with specific strategies

Report

- What needs are identified across organizations?
- How can we work together to build capacity?

Discussions

- What are the next steps for the movement?

Wikimania
2014

An inclusive, impact-focused process

How do Wikimedia movement actors define “effectiveness” and “impact”?

What capacities are tied to impact? Where are there strengths and gaps in capacities?

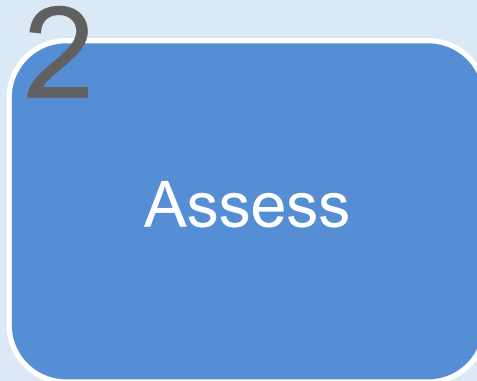
How can we work together on organizational effectiveness?



Understand

Elements:

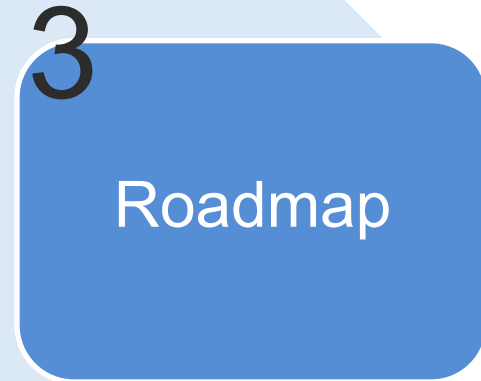
- **Benchmarking**
- **Interviews**
- **Surveys**
- **Wikimania consultation**



Assess

Elements:

- **Conversations with stakeholders**
- **Case studies**
- **OE questionnaire**
- **OE learning center**



Roadmap

Elements:

- **Analysis**
- **Discussions**
- **Define next steps**

Case studies on impact

We interviewed three organizations (a chapter, user group, and thematic organization) to learn more about how they are achieving results.

- Wikimedia Österreich
- Wikimedians of Nepal User Group
- Amical Wikimedia

Wikimedia Österreich also uses peer learning, transparency around organizational priorities, and a commitment to experimentation to increase its organizational effectiveness. Specifically, these key factors include:

- **Learning from other Wikimedia groups.** Wikimedia Österreich credits much of its early success to its ability to learn from other Wikimedia groups and chapters. In the beginning phase, this helped Wikimedia Österreich prioritize role clarity and communication. The chapter was able to

Wikimedians of Nepal User Group Case Study on Organizational Effectiveness October 2014

Wikimedians of Nepal User Group was the first Wikimedia user group to be recognized by the Affiliations Committee in May 2013, although the group has been active since July 2010. Wikimedians of Nepal User Group was part of the impetus for creating a user group status as another entry point into the world of recognized Wikimedia organizations. Unlike Wikimedia Chapters and Thematic Organizations, Wikimedia User Groups are less formal groups of volunteers that do not need to be

Amical Wikimedia offers some approaches to organizational effectiveness that could be adapted by other Wikimedia organizations. These include:

- **Using a tiered system of volunteer engagement.** Amical maximizes its ability to work with volunteers effectively by using a tiered system, or ladder of engagement, to offer the right levels of support to volunteers at different stages. In this way, volunteers are given both support and learning opportunities appropriate to their levels of engagement. Other Wikimedia organizations could think about understanding how their volunteers engage with their work in different ways, and developing criteria for different tiers of volunteers.
- **Saying no to some opportunities and considering every opportunity in the context of organizational priorities.** Wikimedia Amical recognizes it has limited resources (e.g. time, staff, money), and prioritizes high impact projects that will be sustainable without long-term organizational investment. They rely on volunteers and partners to support impactful projects in the long term. Therefore, Amical Wikimedia saves its resources to work on strategies that have

Case studies: what we learned

Establish **informal ways** to collect information about how your organization is doing that are accessible, and encourage group contributions.

Openly discuss success and failure with stakeholders; **“lower the stakes”** by launching programs as small pilots, and document and discuss what works and what doesn’t.

Engage volunteers in different ways, according to their strengths and interests.

Develop **criteria for saying “no”** to some opportunities that are not likely to lead to impact (for example, if they are unlikely to be sustained by volunteers in the long term).

Establish partnerships with institutions that already have an **existing infrastructure** to initiate, support, host, or expand Wikimedia projects.

Be **proactive and direct** when you need help, and reach out to other open knowledge organizations for tips on how to deal with local challenges or context.

Create a **“blueprint” for successful local programs** specific to your organization’s context, so they can be repeated or sustained in the future.

OE tool: structure and relationship of elements

Questionnaire

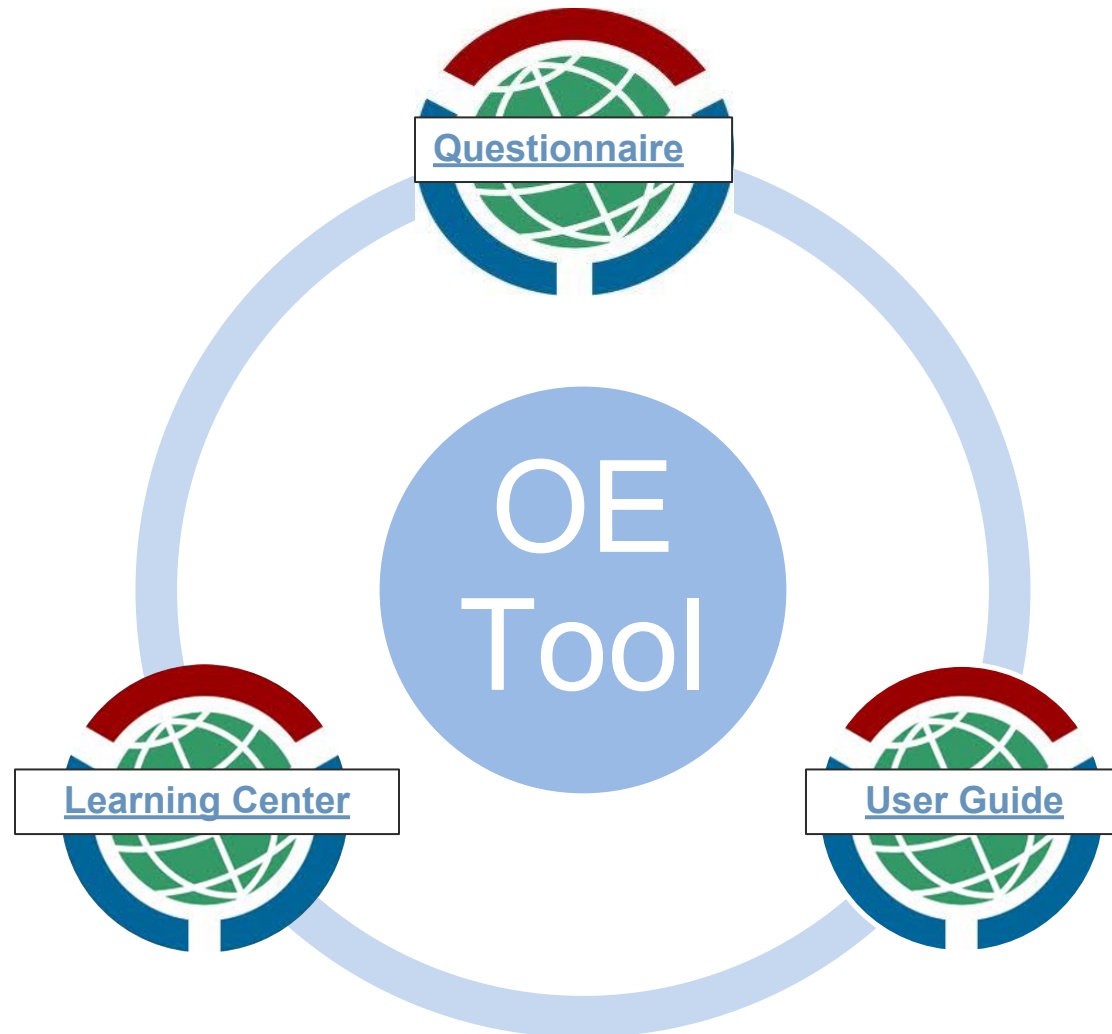
includes questions about strategies. Organizations only choose optional strategies relevant to them.

User Guide

explains the project and how to use the tool (including questionnaire / results report, learning center).

Learning Center

includes resources for strategies from the questionnaire, and a space for organizations to learn and share around OE topics.



The background features a close-up of tree leaves with prominent veins, set against a bright, slightly overcast sky. A solid blue horizontal band spans the width of the image, serving as a backdrop for the main title.

Aggregate analysis of questionnaire findings



Aggregate findings

BACKGROUND CHARACTERISTICS

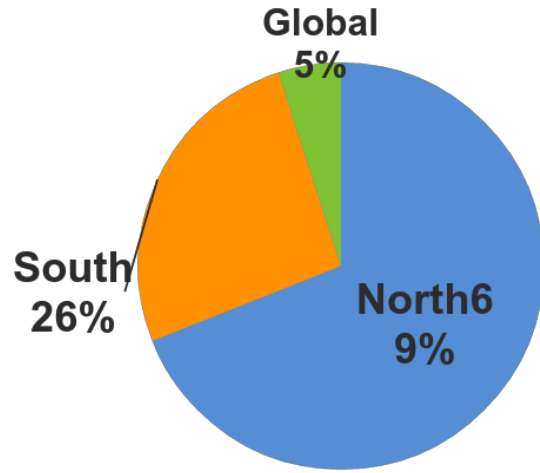
Assumptions

- This tool is designed first and foremost as a self-assessment tool rather than a survey. The tool is intended to be used by specific organizations who want to build a capacity-building plan. Learning from these aggregate results is an added benefit, but the analysis of the aggregate results is not the primary use case for this tool or the questionnaire.
- The first iteration of this tool is an experiment. This is one of the reasons why we brought in an external firm with expertise in creating self-assessments to help us with this work. Improving this tool is an ongoing process, and your feedback is needed as part of this discussion.

Aggregate findings

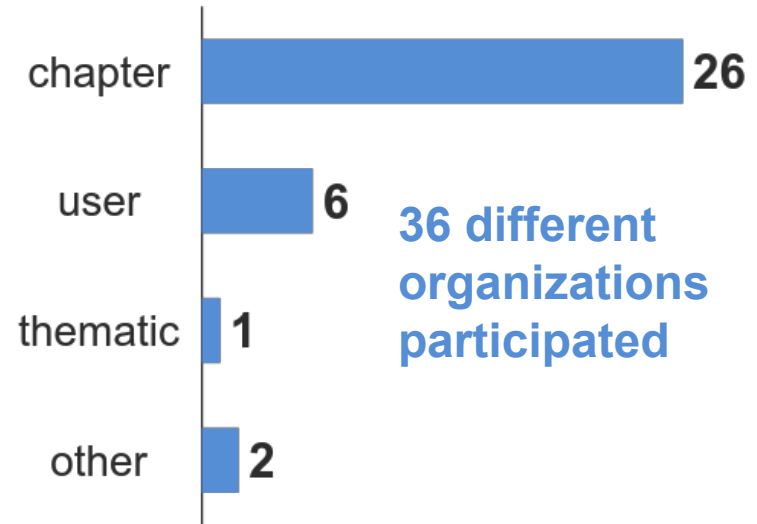
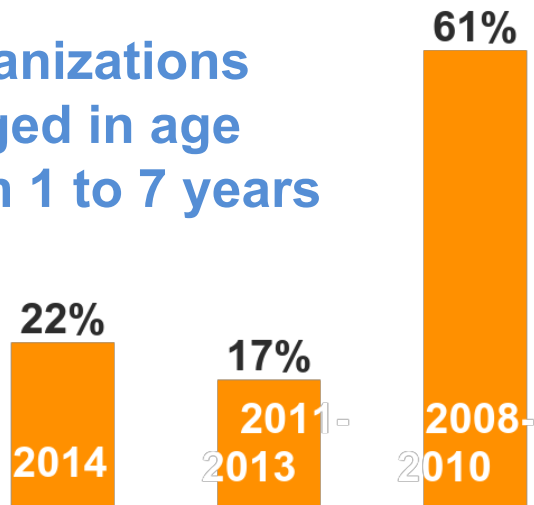
- Organizations and groups were invited to participate without sharing their specific results with the Wikimedia Foundation or others in the movement. This was done to give organizations space to conduct an accurate self-assessment.
- This means that we can only share aggregate findings with the movement, without identifying specific organizations. This section will provide an overview about who participated, without identifying specific organizations.

Who took the questionnaire?

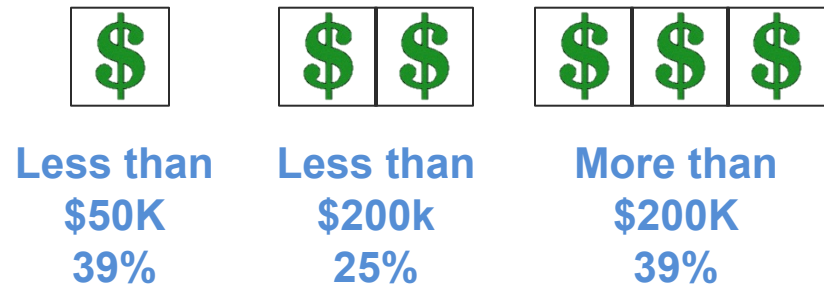


103 individuals responded

Organizations ranged in age from 1 to 7 years



Of the 36 different organizations:



Categories used in analysis

- Four group characteristics are analyzed for differences in scores: age, budget, geography, organization type.
- Most individual respondents were with chapters with large budgets from the global North, and more than 7 years old.

Age	Budget	Geography	Org. Type
23 were created from 2008-2010	14 have small budgets	22 are from the global North	26 are chapters
5 were created from 2011-2013	9 have medium budgets	12 are from the global South	6 are user groups
8 were created in 2014	35 have large budgets	2 do not have a geographic focus	1 is thematic

2 are **not recognized**

Questions scale

- Most questions use the Likert Scale, which asks individuals to read a statement, then select the response that best reflects their agreement with that statement. The responses are numbered 1-5 from “Strongly Disagree” to “Strongly Agree.”
- TCC Group uses the following ranges to present the findings in this presentation:

Disagree	Neither Agree nor Disagree	Agree
1.00 – 2.50	2.51 - 3.50	3.51 – 5.00

What these scores mean

- A high average score for a given strategy may indicate that organizations rate this area as important and feel they have significant capacity in this area. A low average score for a given strategy may indicate that organizations do not rate this area as important, or that they have significant gaps in capacity.
- Scores in specific areas will give a more specific idea about how organizations responded
- As is typical in self-assessments, respondents tended to rate their organizations highly. This means that most scores will be on the higher end of the likert scale (above a 3.5).



Aggregate findings

CORE STRATEGIES USED BY ALL WIKIMEDIA ORGANIZATIONS

Core strategies used by all organizations

Volunteers

Diversity

Online
Contributors

Learning

Resources

High and low scores across core strategies

Overall scores may indicate how important a strategy is to organizations, as well as indicating how organizations assess their own capacities.

- The highest scoring core strategy across all types of organizations is **resource mobilization (includes fundraising)**.
- The lowest scoring core strategy across all types of organizations is **working with volunteers**.

Core strategies for all organizations	Overall scores (N=36) 1 = Strongly Disagree 5 = Strongly Agree
Resources	3.8
Diversity	3.6
Online contributors	3.6
Learning	3.4
Volunteers	3.2

Strengths and challenges in core strategies – by budget size

	Small (0-50,000 USD)	Medium (50,000-200,000 USD)	Large (>200,000 USD)
Strengths		<ul style="list-style-type: none"> • Partnerships • Finances • Planning 	<ul style="list-style-type: none"> • Collecting data and feedback • Volunteer input • Partnerships • Finances • Planning • Prioritizing diversity
Challenges	<ul style="list-style-type: none"> • In-kind resources • Collecting data and feedback • Acknowledging volunteers • Volunteer input • Effective trainings • Resources for community-building • Partnerships & resources for partnerships • Planning 	<ul style="list-style-type: none"> • Acknowledging volunteers • Resources for community-building • Resources for partnerships • Collecting data and feedback • Effective trainings 	<ul style="list-style-type: none"> • Resources for community-building • Resources for partnerships

Learning behaviors – strengths and challenges

The highest scores are for understanding open knowledge context and refining strategy; lowest scores are for collecting data systematically.

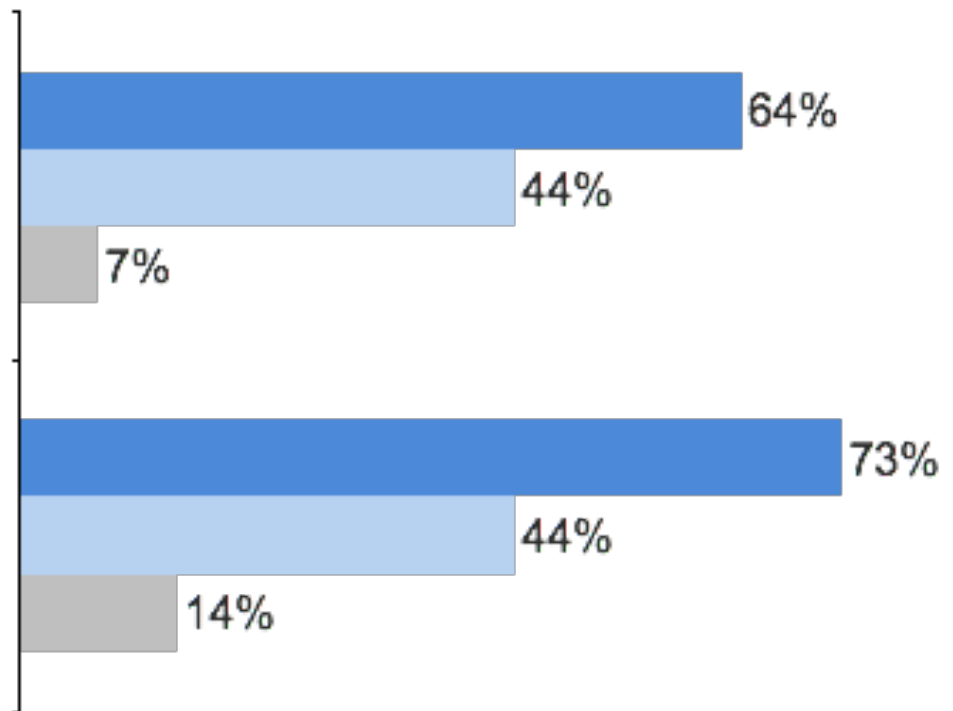


Learning behaviors – by budget size

Organizations with larger budgets say they are able to collect data systematically. This may be because they have more resources to do this, or their boards or funders ask them to.

■ Large ■ Medium ■ Small
Level of Agreement

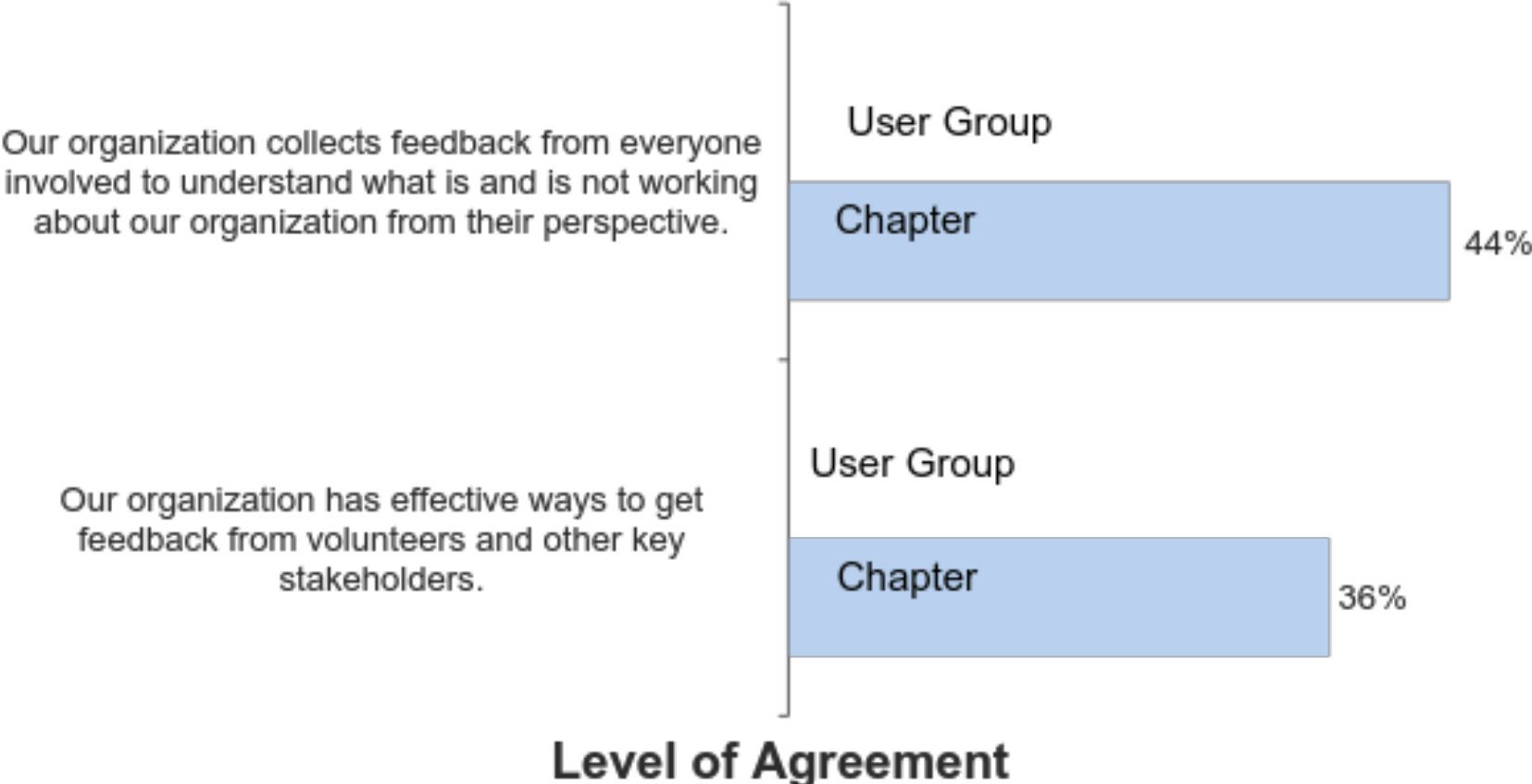
Our organization systematically collects and documents data from every activity to understand its impact.



Our organization collects feedback from everyone involved to understand what is and isn't working.

Learning Behaviors – by Organization Type

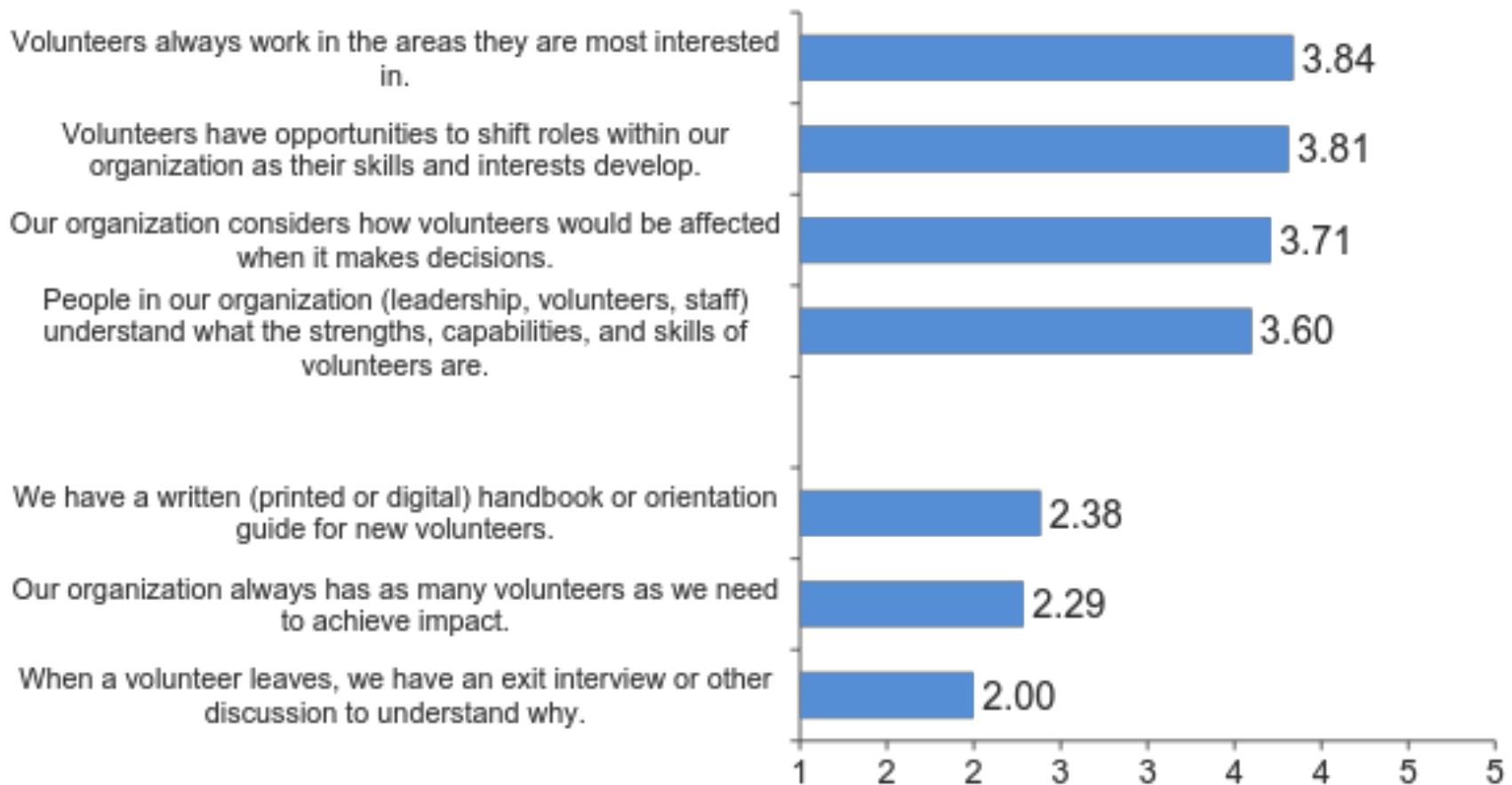
No User Groups report collecting data from all of their stakeholders; less than half of chapters report doing so.



Working with Volunteers – Strengths and Challenges

Organizations understand volunteer skills and interests, but don't provide much formal structure to support them.

Strengths



Challenges

Resource Mobilization – Strengths and Challenges

Organizations believe getting more resources is important, and are actively looking for resources.

Strengths

Raising resources (whether financial or in-kind) is critical for our organization to sustain its work.

3.98
09

Our organization proactively looks for in-kind resources our members or partners can provide us (for example, facility space, equipment, expertise).

3.97
89

The majority of people in our organization believe it's important for us to find sources of financial support outside of the Wikimedia Foundation.

3.88
57

Challenges

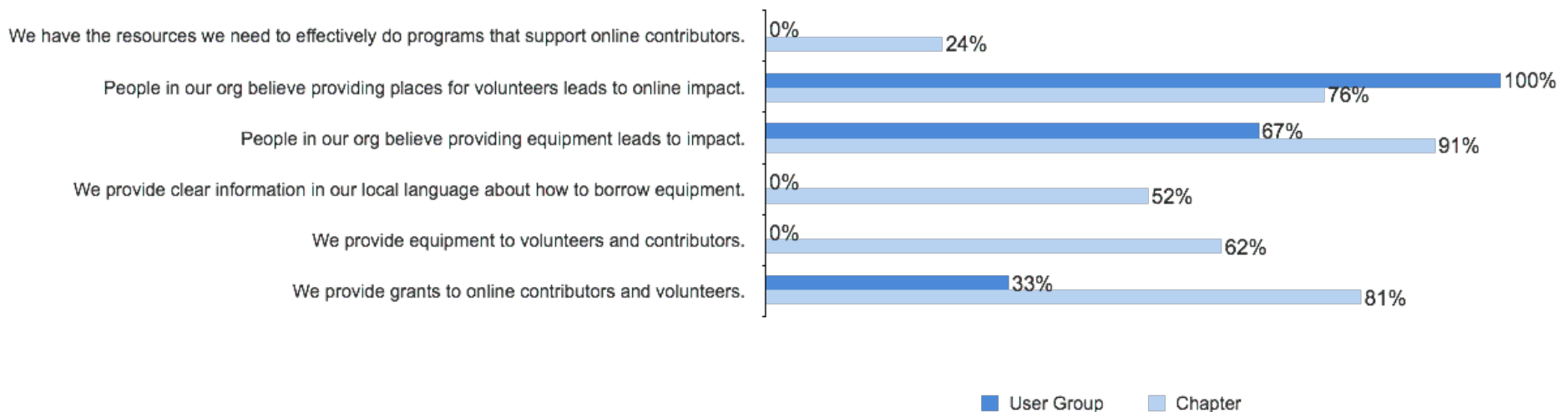
Our organization knows about, and uses, all of the in-kind resources (for example, facility space, equipment, expertise) available to us through our members and partners.

3.67
70

1 2 2 3 3 4 4 5 5

Resource Mobilization – by organization type

Chapters provide grants and equipment, while user groups believe meeting spaces for volunteers are important.

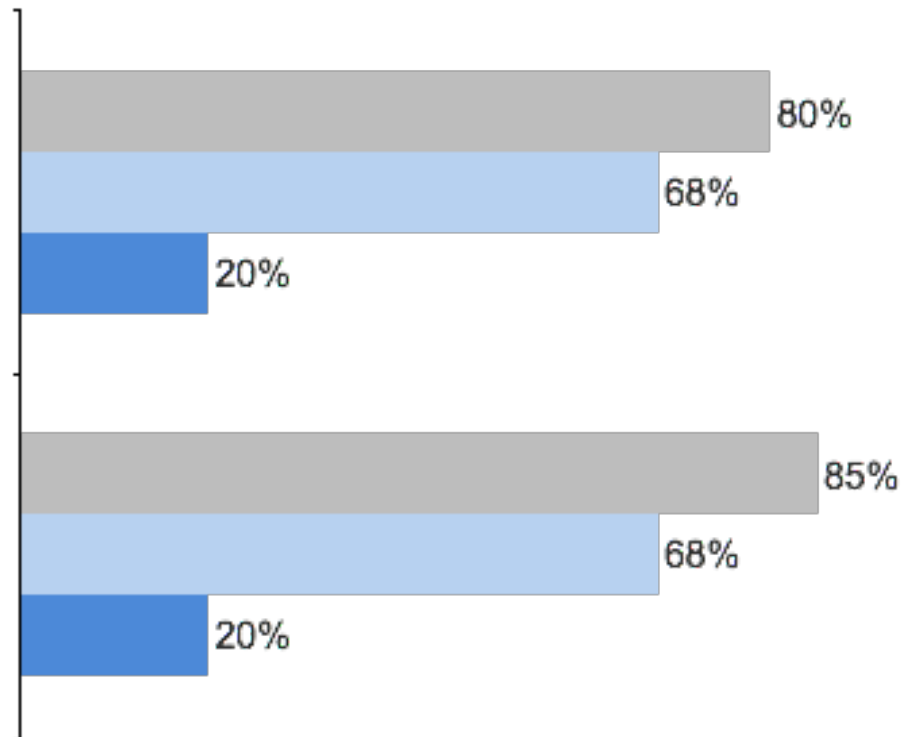


Work with Online Contributors – by Organization Age

Not surprisingly, older organizations that are often more formal have more experience giving grants to online contributors.

■ Oldest ■ Middle ■ Newest
Level of Agreement

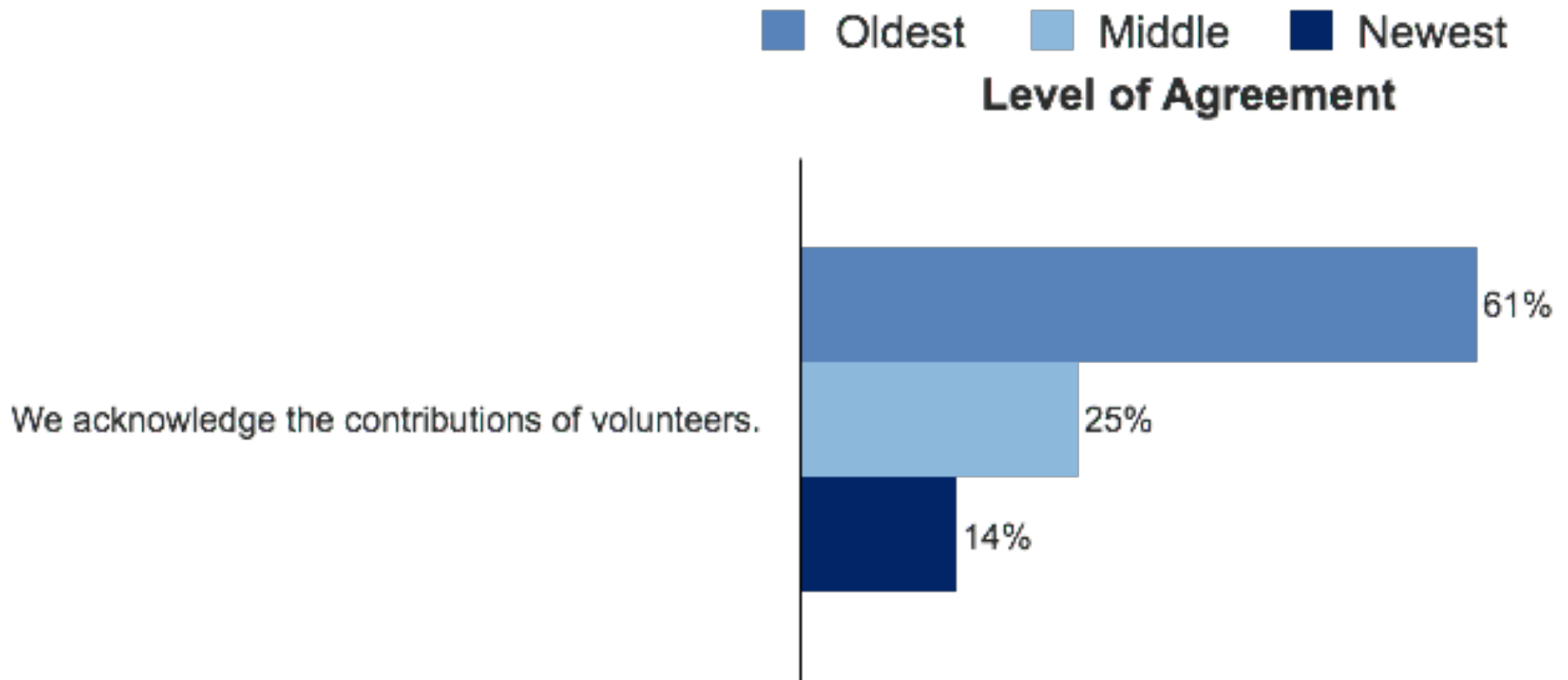
We provide information in our local language on how to apply for grants.



We provide grants to volunteers or contributors.

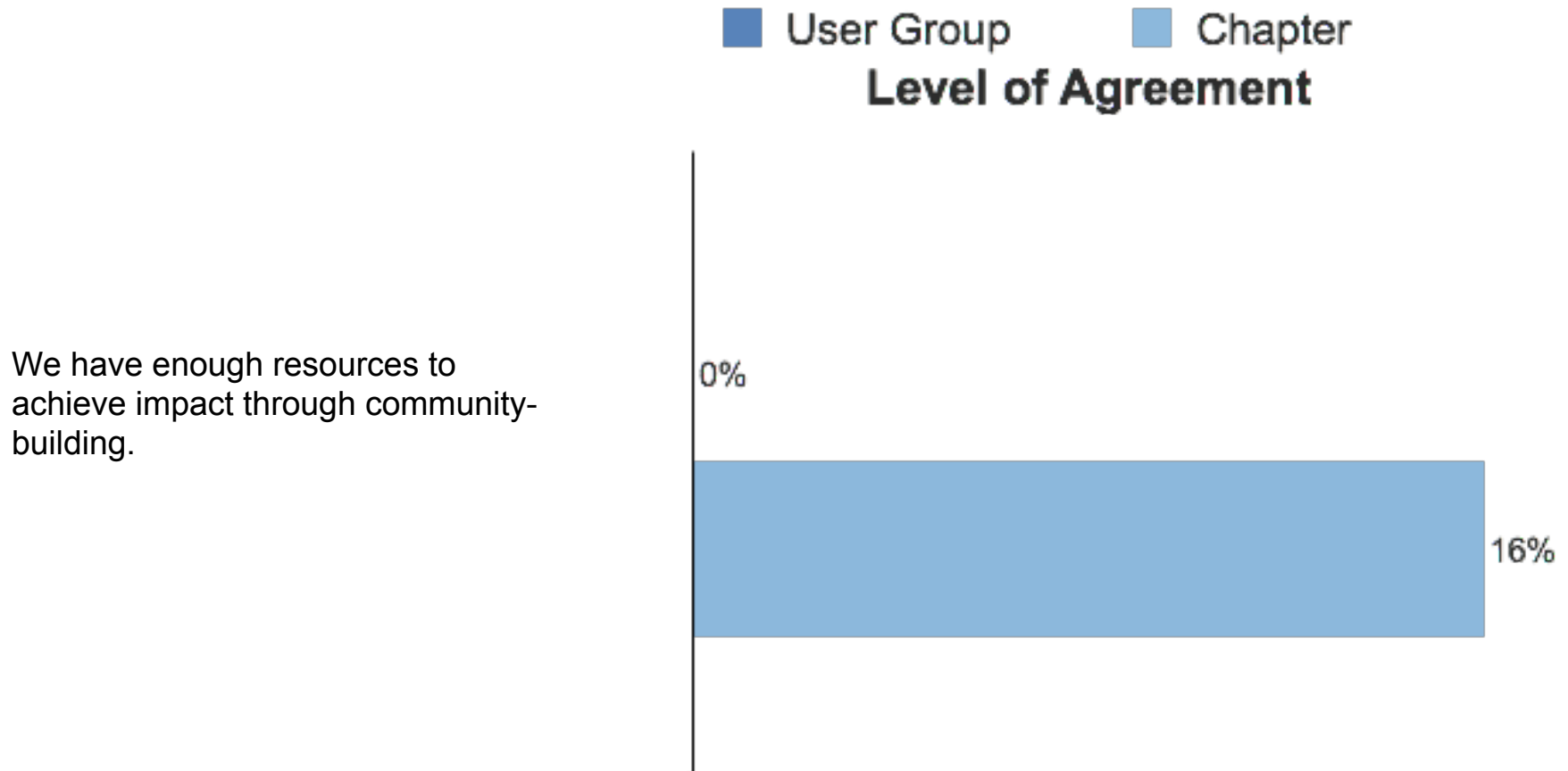
Working with Volunteers – by Organization Age

Older organizations are more likely to acknowledge the contributions of volunteers; this may result from working with a large or core contingent of volunteers for a longer period than newer organizations.



Work with Online Contributors – by Organization Type

Chapters are slightly more likely than other organization types to feel they have enough resources for community-building, but still only a minority of chapters agree with this statement.





Aggregate findings

OPTIONAL STRATEGIES

Optional strategies

Altogether, we asked about nine optional strategies. For optional strategies, organizations were given the option to not select a strategy that they were not using. This chart gives an indication of what optional strategies organizations indicated they were using.

Optional strategies	% using
Edit-a-thons, workshops, trainings	88%
Partnerships, including GLAM and education	86%
Governance	84%
Planning	84%
Online contests	81%
Finances	80%
Supporting online contributors by providing resources	76%
Advocacy work	66%
Developing software or tools	35%

Average scores across optional strategies

Many optional strategies had high scores. These included finances, edit-a-thons, online contests, supporting contributors with resources, advocacy work, and governance. This means organizations rated them as important, and / or they have capacity in these areas.

Planning, partnerships, and software / technology had significantly lower scores. This means organizations did not rate them as important, and / or may have gaps in capacity in these areas.

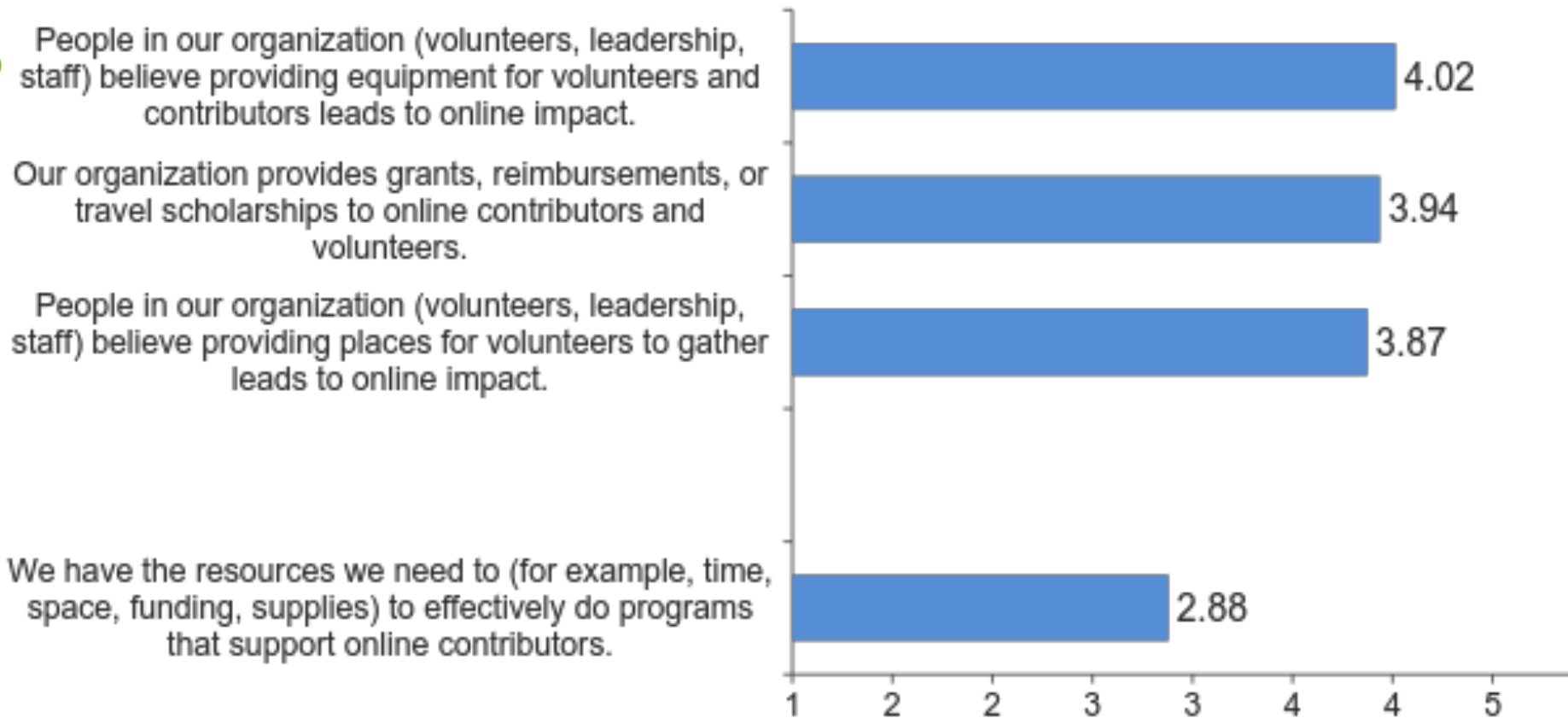
Other Strategies for Wiki Orgs.	Overall Scores by Wiki Group (N=15-29)
Finances	3.7
Edit-a-thons, workshops, trainings	3.6
Online contests	3.6
Supporting contributors with resources	3.6
Advocacy work	3.6
Governance	3.5
Planning	3.4
Partnerships	3.2
Software/tech	3.2

Support contributors with resources – strengths and challenges

Organizations believed providing equipment and places to meet leads to online impact, but did not have enough capacity to effectively support contributors with resources.

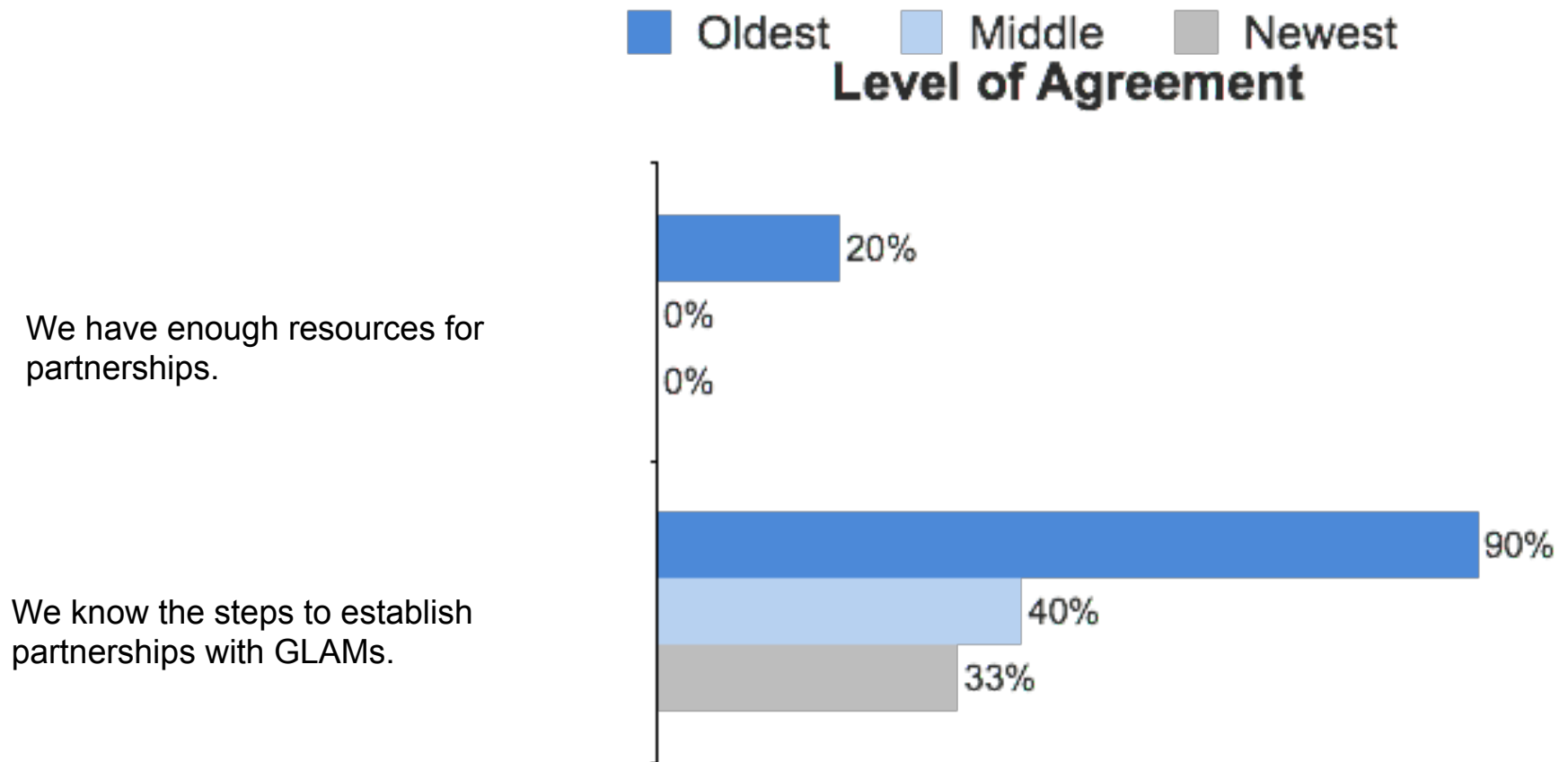
Strengths

Challenges



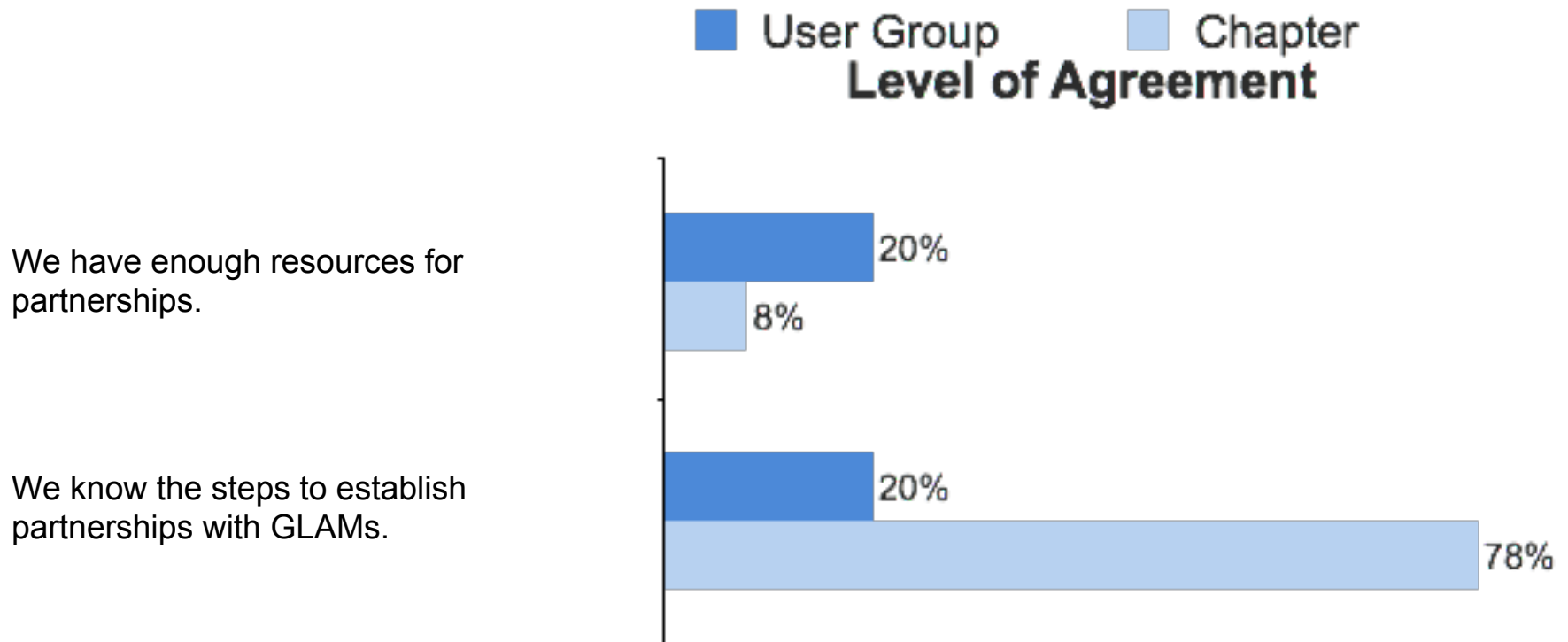
Partnerships – by organization age

Despite a similar feeling across organization ages that they do not have enough resources, older organizations know how to establish partnerships with GLAMs.



Partnerships – by Organization Type

Chapters seem to know how to form partnerships more than User Groups but are also more likely to report lack of resources to achieve impact through partnerships. Perhaps chapters more actively pursue this strategy than others, but also have higher expectations for impact and for the resources it takes to do partnerships well.

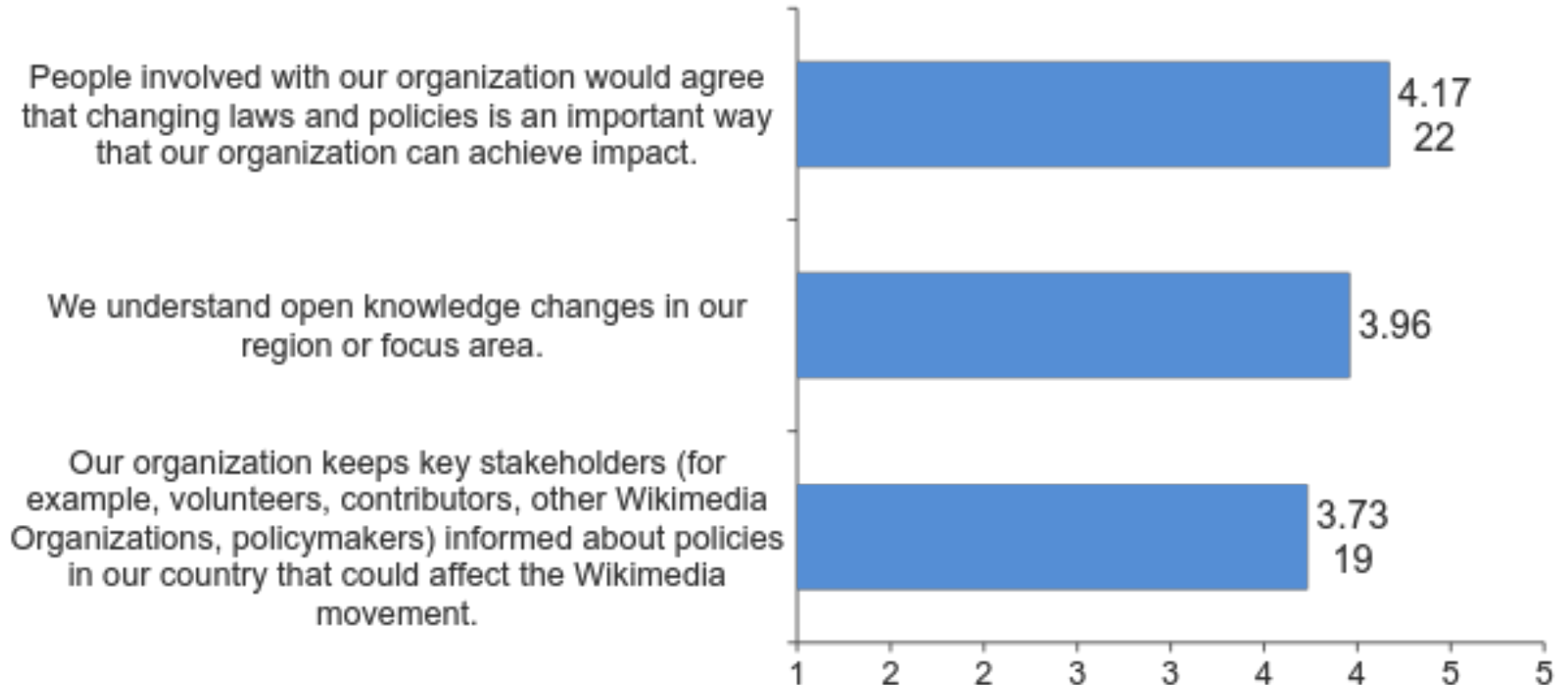


Advocacy Work – Strengths and Challenges

Organizations agree outreach, awareness, and policy work can lead to impact, and are working toward keeping stakeholders more informed.

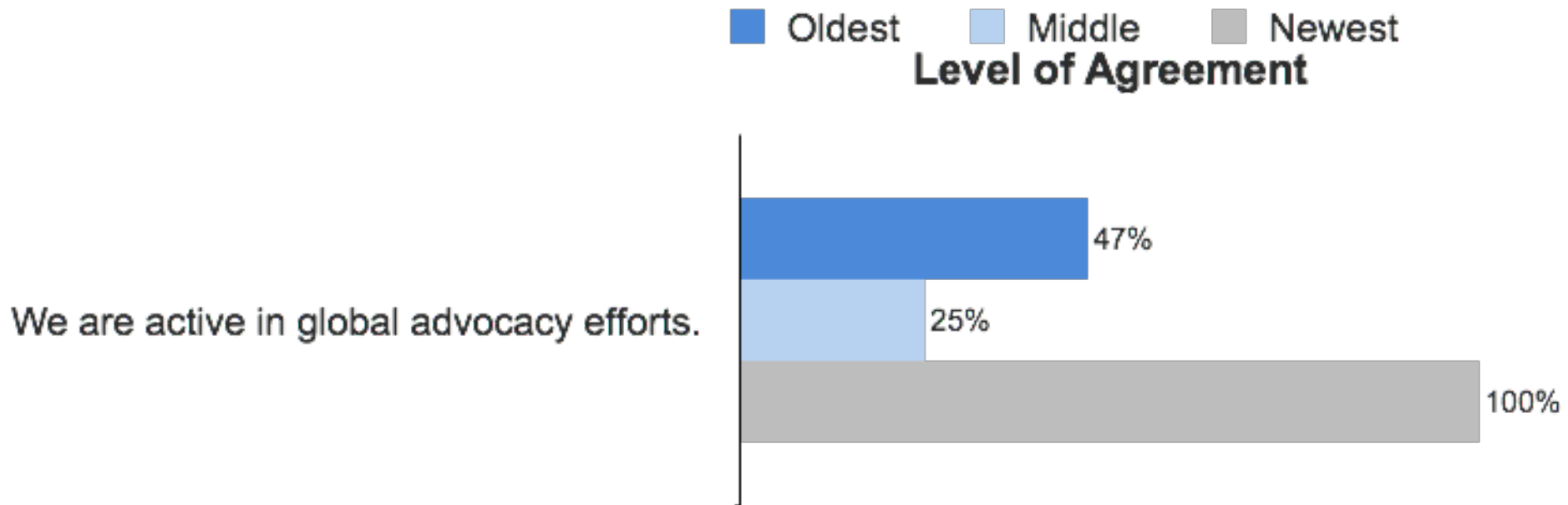
Strengths

Challenges



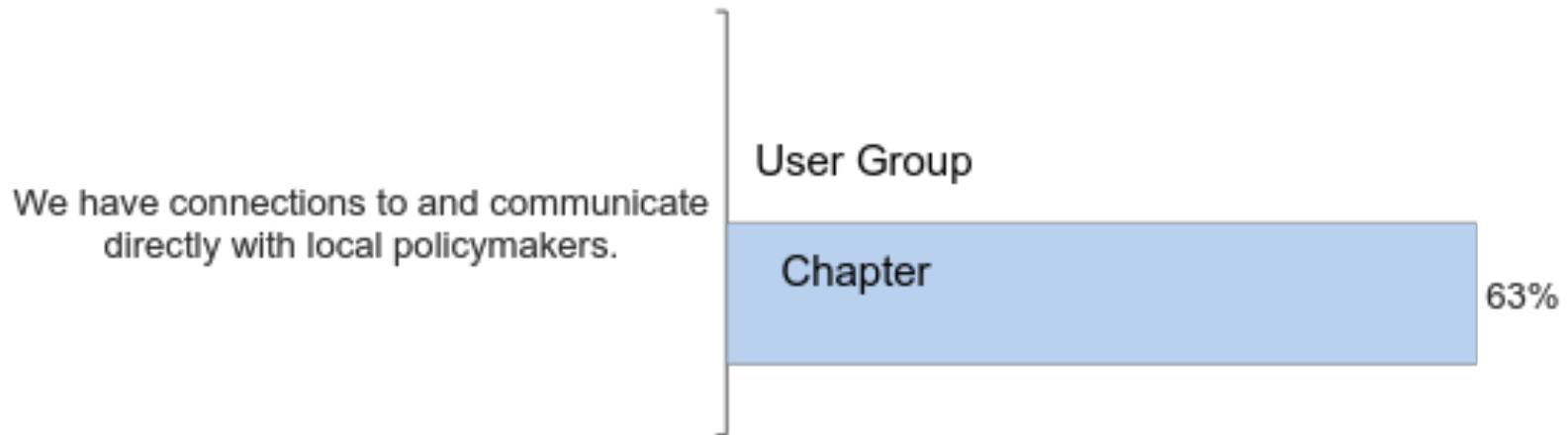
Advocacy – by organization age

Newer organizations are very active in advocacy work (more active than older organizations). This category also includes awareness work and outreach (e.g. keeping the local public informed).



Advocacy – by organization type

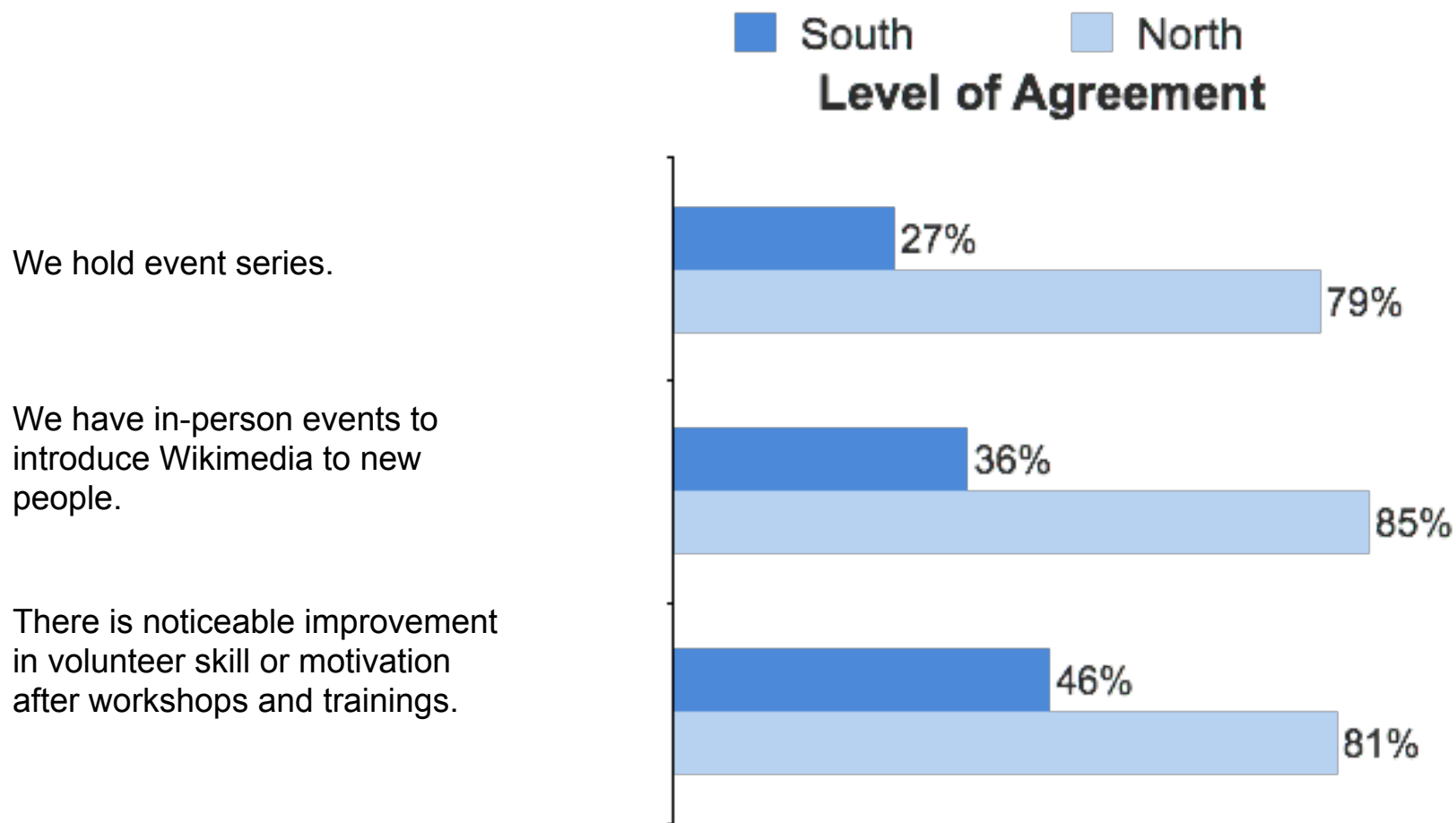
Chapters are much more likely than user groups to report access to local policymakers. This may be because their comparatively formal status enables them to lobby, or it may have to do with chapters more actively pursuing advocacy as a priority strategy.



Level of Agreement

Edit-a-thons, Workshops, Trainings – by Geography

Organizations in the global north are significantly more likely to hold event series, have outreach events, and to see improvement in volunteer skill and motivation after trainings.

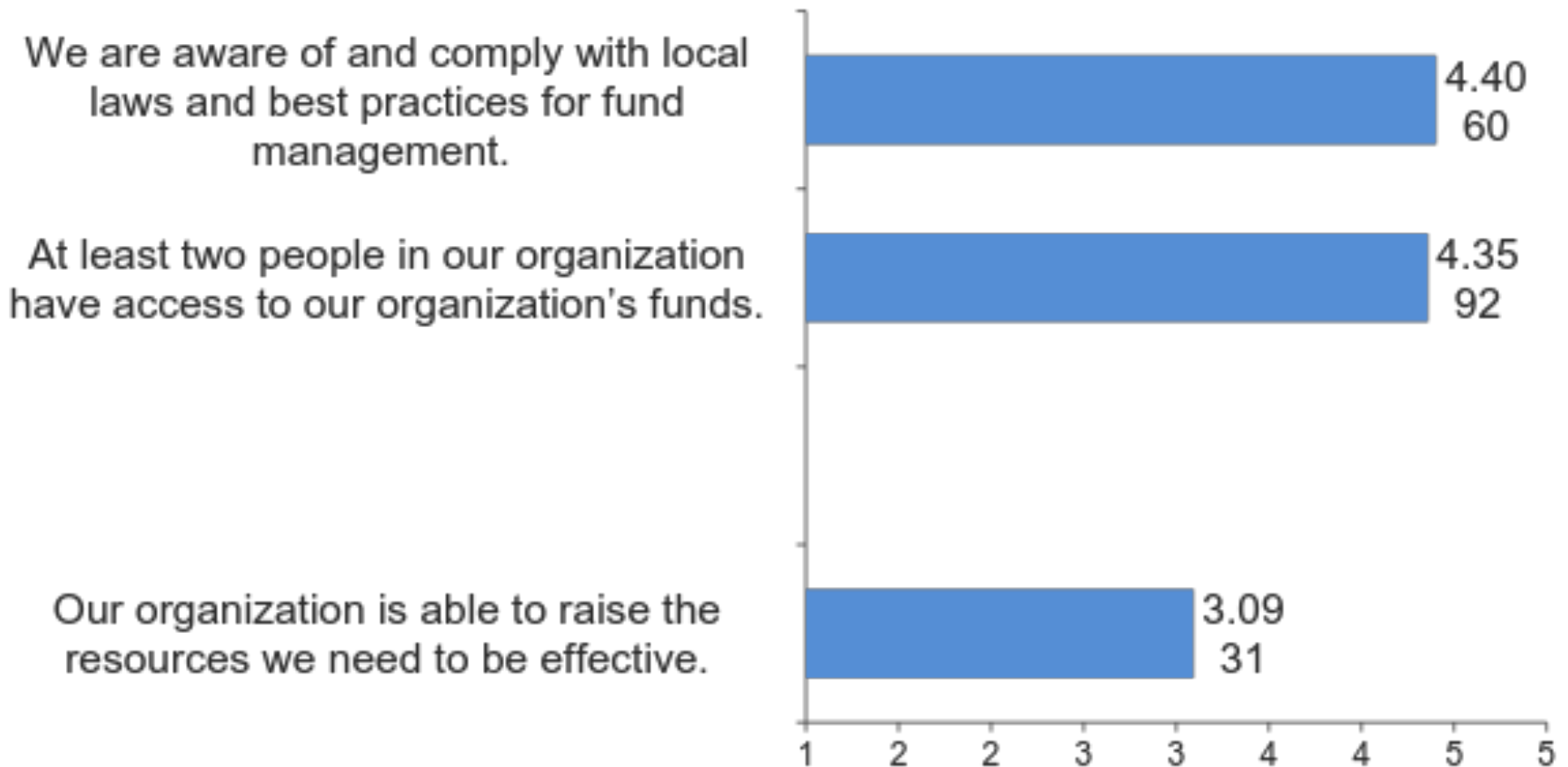


Finances – Strengths and Challenges

Organizations score highly in managing finances, but are challenged to raise resources.

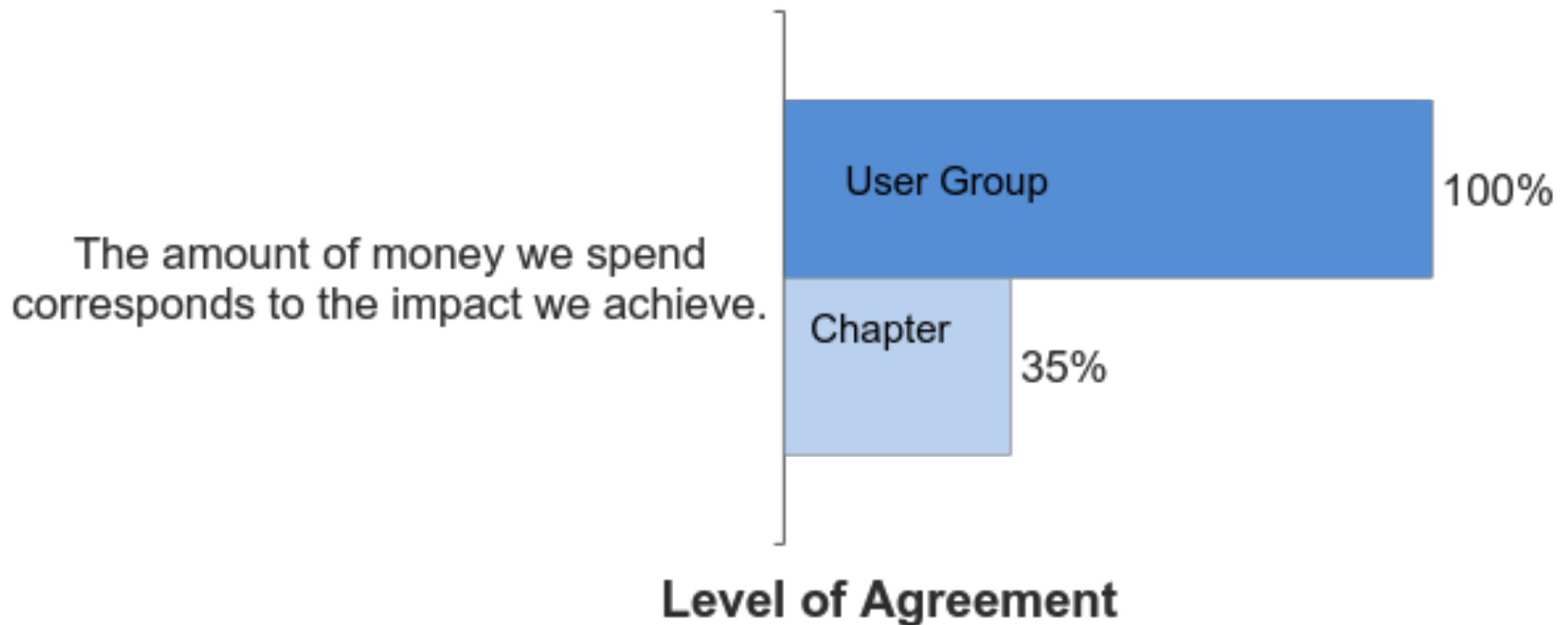
Strengths

Challenges



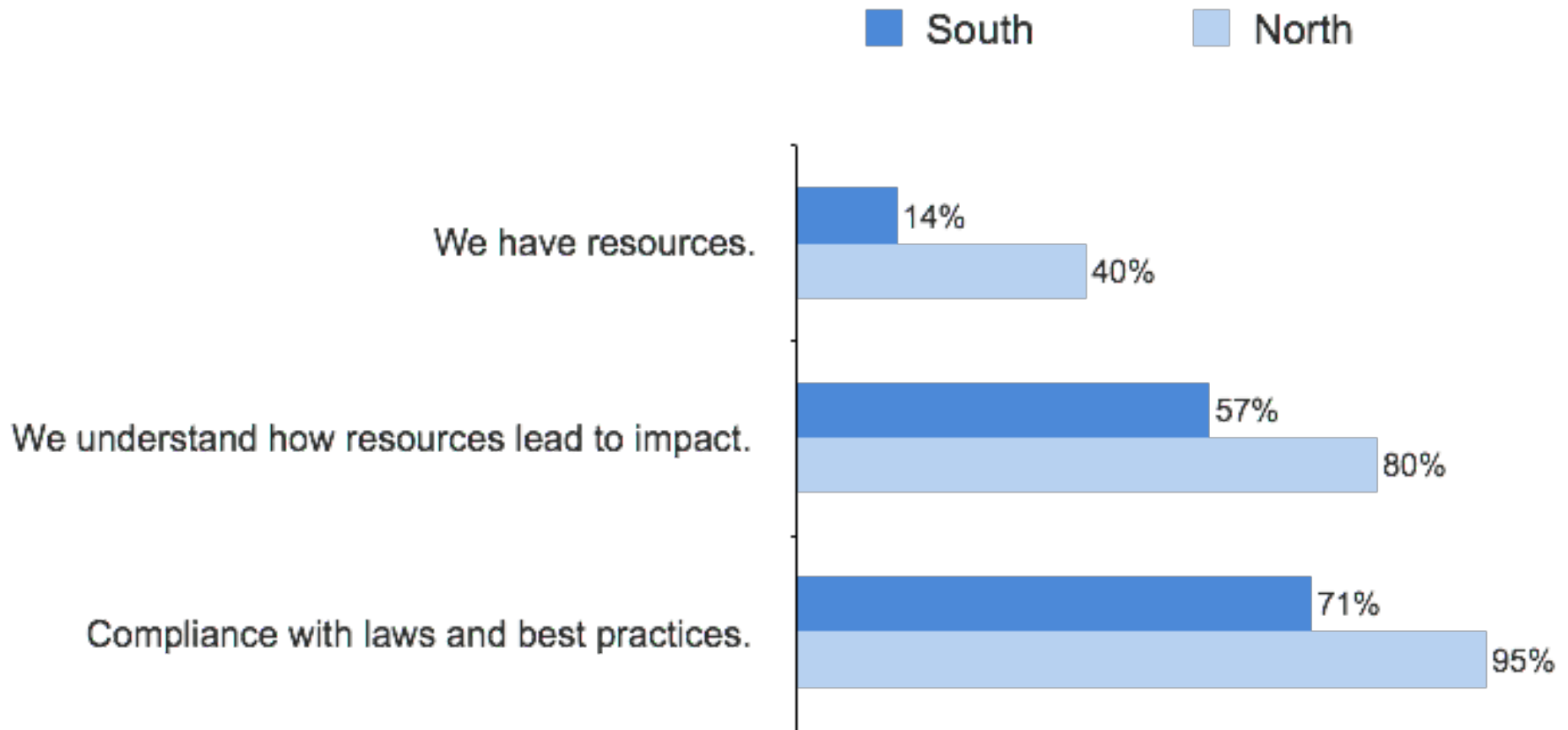
Finances – by Organization Type

User groups see that the amount of money they spend is in proportion to the impact they achieve, while chapters agree less so.



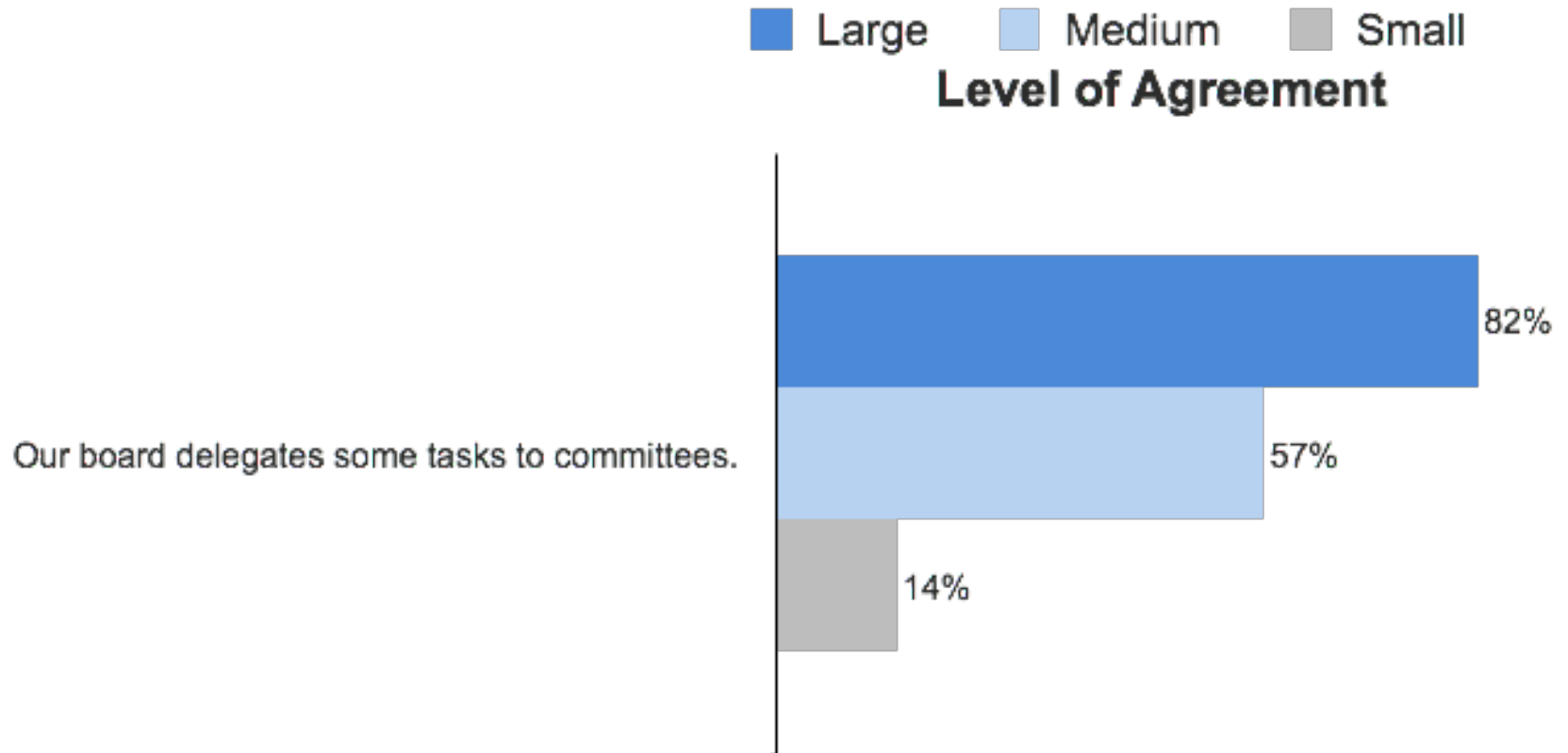
Finances – by Geography

Global north organizations have resources and comply with best practices more than global south organizations.



Governance - by Budget Size

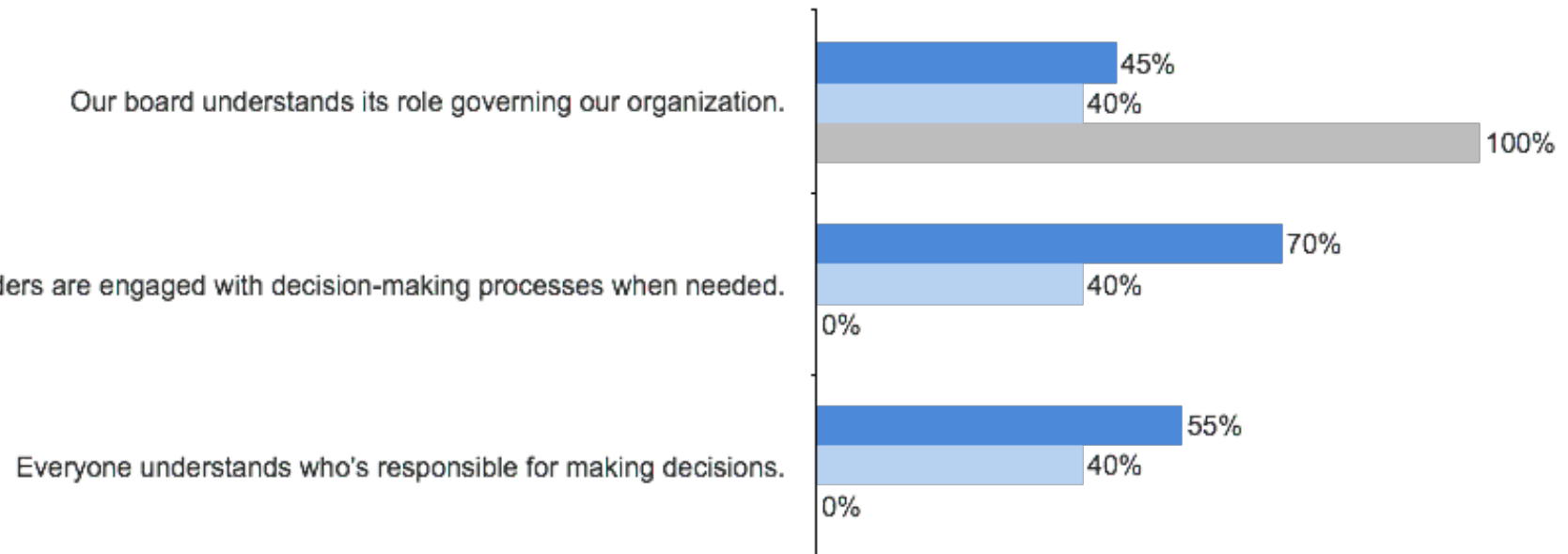
Larger organizations are more likely to have boards delegate tasks to subcommittees.



Governance – by Organization Age

Newer organizations have clarity on the board's role, but need more clarity on who is responsible for decisions.

■ Oldest ■ Middle ■ Newest
Level of Agreement





Aggregate Findings

QUALITATIVE ANALYSIS

A few organizations were unclear about the phrase “collecting data”.

- For example, when asked what data or information they collect on resource mobilization, some organizations said:
 - *“We get financial support as we can, in no organized way.”*
 - *“Each time we need a resource, we ask our members for help.”*
- This indicates that for some groups, the idea of collecting data is unclear, or the phrase or language may be unfamiliar to them.

Organizations think about data collection in three ways.

1. They collect data required by funders or internal policies, but it's meaningless to their learning.
“We...are spending a frustrating amount of time as it is tracking every trivial receipt and name. It is nice to be able to leave our attendees alone...and not obsess over [demographic data collection.]”
2. They collect a lot of rigorous data and use it internally for learning.
“[We use] case study reports to include lessons learnt, FDC reports to include reflections on what worked/what has not, reports from site visits at other chapters...programme review projects...including recommendations for the future.”
3. They collect virtually no data.
“[We collect] almost nothing, or perhaps, whatever anyone cares to remember. Nothing is written or recorded.”



RECOMMENDATIONS FOR MOVEMENT-WIDE CAPACITY BUILDING

Capacity-building roadmap

1) TCC Group Recommendations

- Best processes for building capacity, based on work with other organizations and in Wikimedia.
- Specific capacities that could be strengthened, based on the results of the questionnaire.

2) A framework for the Wikimedia Movement

- To dive deeper and create its own prioritized capacity-building plans.
- To plan for the OE Tool's ongoing use and development.

Potential strategies to build capacity

Support organizations in interpreting OE Tool results to create their own master capacity-building plans.

- **Offer one-on-one interpretation sessions** to help organizations look at strengths and challenges and prioritize areas for growth and how to implement recommendations. This would require organizations sharing their results.
- **Host working sessions** for groups with similar capacity challenges or interests. Allow groups to lead the sessions, but offer input about content or resources available; make connections.

Conduct in-depth research with groups.

- **Be a part of a pilot group on any of these strategies** to better understand how to execute strategies more effectively.

Potential Strategies to build capacity, Continued

Facilitate connections among groups.

- **“Matchmake” among groups** that may be able to learn from one another but that haven’t yet connected. Proactively reach out to other organizations to build resources that are relevant to organizations.

Build understanding around incentives for improving OE.

- **Understand the benefit** of building capacity in complex or conceptually difficult areas (like learning behavior).

Provide easily tailored documents and templates.

- **Consider materials like a volunteer handbook** for core strategies such as work with volunteers and learning. These are already being created for specific programs, but more resources may be needed in non-program areas.

Specific recommendations for the movement: partnerships

Better understand and document the informal and formal steps to build partnerships with GLAMs and education institutions.

Understand why organizations in the global south have more difficulty with partnership models used elsewhere in the movement.

Create criteria to identify the highest impact partnerships for organizations, so they can apply this in their own local contexts.
Understand how specific partnerships lead to impact for organizations and the movement overall.

Facilitate partnerships at a regional level and/or advocate for policy changes that could result in new, creative and high-impact partnerships for all organizations.

Specific recommendations for the movement: working with volunteers

Only 25% of organizations agree that volunteers know their roles and what they should be doing in a given time frame. Define what volunteers to do, and when.

Make volunteer trainings more effective. Identify what works and find ways to make it easier for volunteers to tell you if training are working (e.g. create or use existing templates to evaluate trainings).

6% of organizations agree they actively recruit volunteers. Explore different ways to recruit volunteers on and offline, and in different contexts. Make volunteer recruitment an explicit goal, and integrate this into existing activities.

Understand why most organizations are not acknowledging volunteer contributions, and learn from organizations that are experimenting with volunteer recognition.

Thank you to the TCC Group!

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Future of the organizational effectiveness tool

- Is a self-assessment for capacity building useful to organizations? Does it fill a need?
- Is the tool in its current version useful? Why or why not?
- How are organizations currently using the tool? How might organizations use a tool like this in the future?
- Should we invest more resources in improving and maintaining the tool (e.g. moving the tool to a permanent platform, continuing to add strategies, promoting use of the tool on a regular basis)?

Improving the tool

- How can the tool be improved?
- Should we keep results anonymized?
- How can we make it easier to interpret and use the results?
- Is the tool equally useful to all types of Wikimedia organizations and groups?

Questions about the future of OE

- Should we continue to spend time discussing and exploring OE as a movement? What are the potential long term benefits of this work?
- Who should be responsible for moving discussion about OE forward? What kind of support, if any, is needed to keep this work going?
- Based on the research we have done so far, are there particular strategies or areas of OE that we should explore together as a movement?

Feedback from the first round of the tool

Applicability to All Organizations

- Translate it!
- Make it more applicable to informal organizations, User Groups, member organizations and small-budget organizations.

Questions

- There should be fewer, more dissimilar questions.
- Questions types should be also be varied – not all likert scale.
- Questions about data should be clearer.
- Questions should be framed from an individual perspective – not asking one person to respond on behalf of the entire organization.

Structure

- Perhaps the Questionnaire should be split into two separate surveys (e.g. core, optional) to cut down on fatigue.
- There should be a “progress bar” to show how many questions are left.
- Consider having one person take the Questionnaire, gathering input from volunteers as necessary; this would be less burdensome on volunteers.