GLEE Community Growth Quarterly Review

Wikimedia Foundation - Q2 of FY14-15

Agenda

Group intro and learnings - 10 minutes

Education - 15 minutes

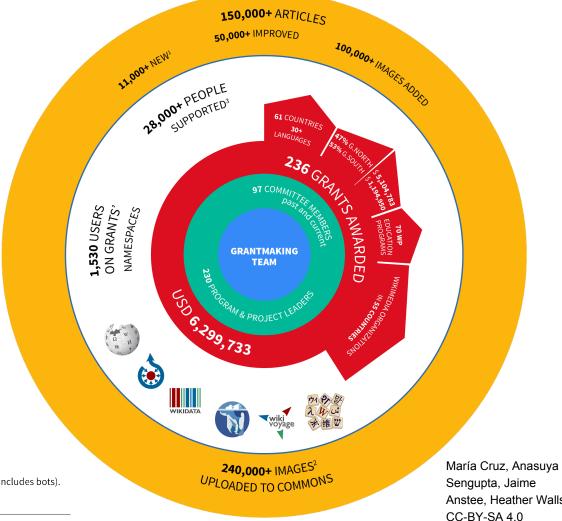
Annual Plan Grants - 15 minutes

The Wikipedia Library - 15 minutes

Learning & Evaluation: Programs & Impact - 15 minutes

Questions and Discussion - 20 minutes

2014 Reach and Impact through Global Contributors and Communities



 $^{^{1}}$ **0.8%** of all new articles created in the top 30 Wikipedia's during the same time period (includes bots).

² **9.3%** of all uploads to Commons during the same time period (does not include bots).

³ Participants of programs funded through September 2014.

Grants in Q2

35 grants at \$4,041,751 to 22 countries

Type of grants	Number of grants	Amount in dollars	Proportion	
			# of grants	\$ of grants
APG	11	\$3,813,143	31%	94%
PEG	13	\$117,891	37%	3%
IEG	8	\$109,271	23%	3%
Travel & Participation	3	\$1,446	9%	0%
Total	35	\$4,041,751	100%	100%

Diversity breakdown of grants awarded in Q2

Total: **35 grants** to 22 countries

18 grants to **Individuals** (51% of total #)

15 grants to **Global South** (38% of total #)

5 grants to **Gender gap**(14% of total #)

Total: **\$4,041,751** to 22 countries

\$120,331 to **Individuals** (3% of total \$)

\$450,934 to **Global South** (11% of total \$)

\$36,768 to **Gender gap** (1% of total \$)

Background: Overarching goals, Q3&Q4

Expand Quality Content (Quality)

Support the creation and improvement of quality content, particularly from GS and women

Target: 10% increase in quality content

Key indicators:

25,500+ new or improved article pages (excludes added images) 8,000+ articles created 58,000 unique media used in articles

Grow Healthy Communities

(Participation)

Support contributors to build strong communities, particularly in the GS and for women Target: **10% increase in program participants** (including separate targets and tracking for both *new* and *existing* active contributors supported, for which, targets will be set upon further data discovery)

Key indicators: 15,000+ participants reached directly through grantee programs participation

Empower Communities' Capacities and Competencies

(Scale)

Ensure capacity-building & leadership development as a key enabler for both quality and participation

Target: Deepen **non-monetary support and resources** for over 300 project and program leaders

Key indicators: 15% increase^{*} in on-wiki resource use

Focus regions

Arab world

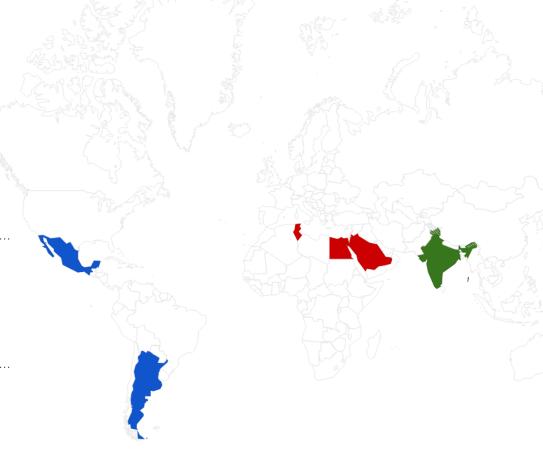
Egypt Jordan Tunisia Saudi Arabia

Spanish-speaking world

Argentina Mexico

Indic languages

Telugu Malayalam



For this QR: Grantmaking's reporting is split into two major focus areas (phases of development)

Experimentation & Community Health

Focuses on **innovative experimentation and research** with current and future communities, as well as identifying and supporting new knowledge.

Includes:

- Seed Grants & Experiments: IdeaLab, IEG, PEG
 Inspire
- Community Research: Global South

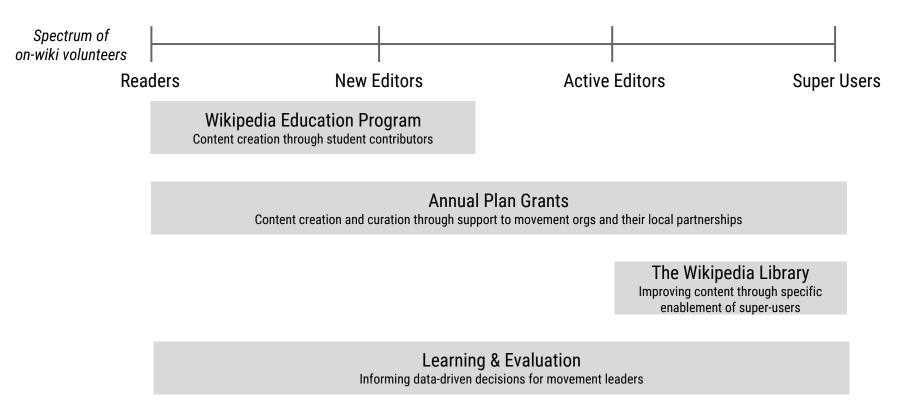
Community Growth

Focuses on expanding quality content and supporting growth of successful programs and communities.

Includes:

- Wikipedia Education Program
- Annual Plan Grants
- The Wikipedia Library
- Learning & Evaluation (programmatic capacity-building and impact)

Activities focus on supporting content growth through different segments of users

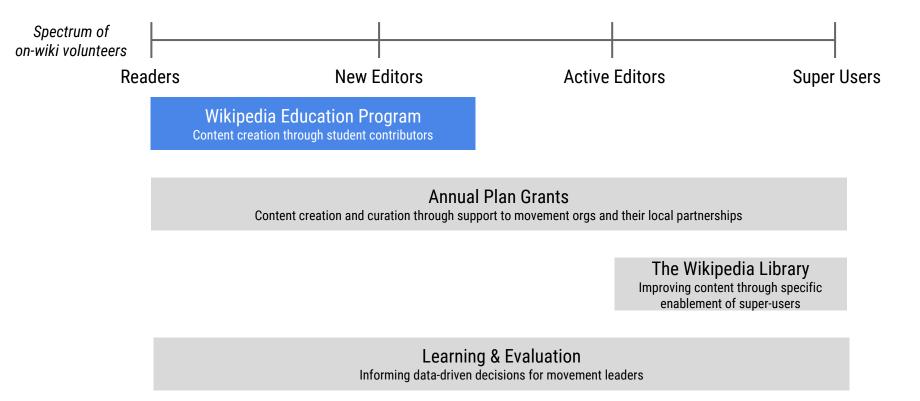


What we all learned: The power of personal relationships and measuring effectiveness

- Establishing baselines is an essential first step for success.
- Regional collaboration is a powerful motivator for communities.
- Cultivating long-term, sustained relationships with volunteers has a significant, positive impact on their engagement.

1. Education

Activities focus on supporting content growth through different segments of users



We achieve impact through educational partnerships

Expand	Quality	Content
---------------	---------	---------

WEPs create quality content

Examples:

- * Diversity (gender, age groups, global south, languages, projects)
- * 51 Good Articles and Featured Articles on ar.wiki
- * 36 Articles of the Day from Wiki Camp Armenia
- * 13 universities, 300 students in a GLAM-Education cooperation in Catalonia

Grow Healthy Communities

WEPs motivate and build local communities

Examples:

- * User groups (Egyptian Wikimedians)
- * Educators (Wikimedia Serbia's accredited course for teachers)
- * Regional conferences with education track (Iberoconf, CEEM, WikiArabia)
- * Education conferences (EduWiki UK, EduWiki Serbia)

Empower Communities' Capacities and Competencies

Support and mentorship increase program leader capacity

Examples:

- * Education is a core part of APG and PEG requests
- * Wikipedia Education Collaborative
- * Program leader mentoring has measurable increase in activity on education portal that in turn supports global network of program leaders (e.g. User:Spiritia)

What we did

We focus on four areas

Map

Data collection
Setting benchmarks

Grow

Arab world
Regional collaborations
Relationships

Mentor

By Education Collaborative By Ed team

Support

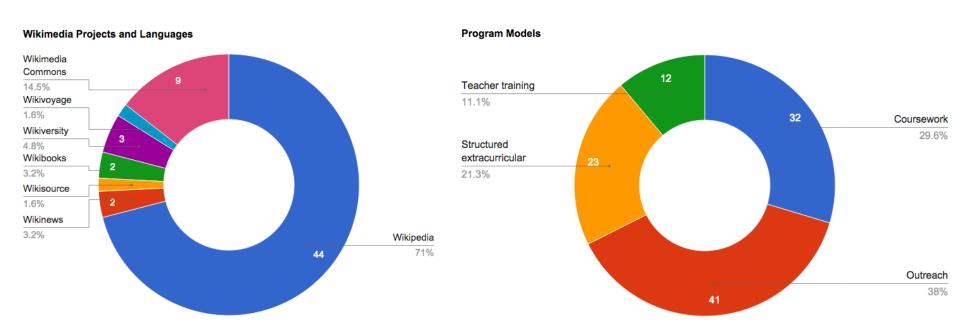
Resources Guidelines Tech

Q2 goals and status

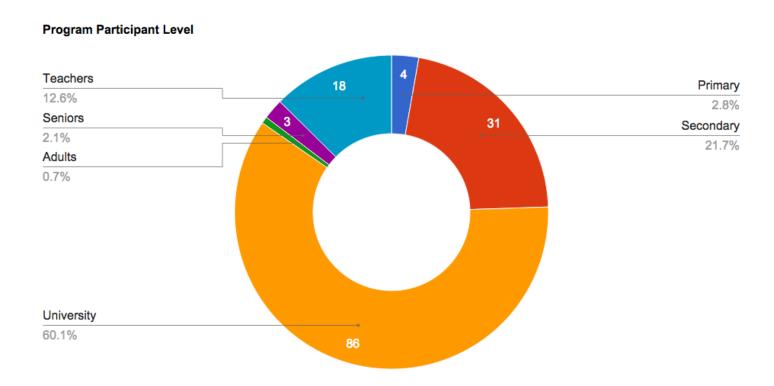
Objective	Measure of success	ETA	Status	Notes
Grow Arabic Wikipedia through education program	* Increase the number of student editors to 300 per term * Add 14 million bytes of content to Arab WP	Summer 2015	✓ Done	* 260 students in summer / fall 2014 term * 15.5 million bytes added in summer and fall 2014
Effectively support education programs worldwide	* Develop effectiveness indicators for 3 different types of ed models * Develop program guidelines for at least 3 different types of ed models	Jan 2015	In progress	* Learning patterns developed * Education toolkit in development * Indicators and guidelines will come out of that
Provide mentorship to growing education programs	Develop mentorship model with the Collaborative	Jan 2015	✓ Done	Model created
Have clear picture of Wikipedia in education worldwide	Develop good working version of dashboard	Jan 2015	✓ Done	Dashboard developed

What we learned

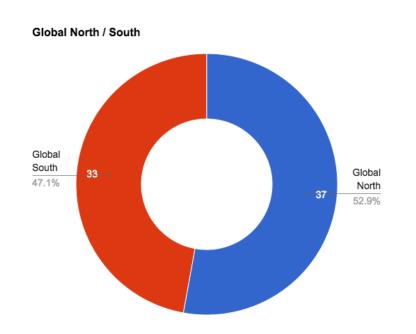
Education programs worldwide are highly diverse, Wikipedia is still the most popular project

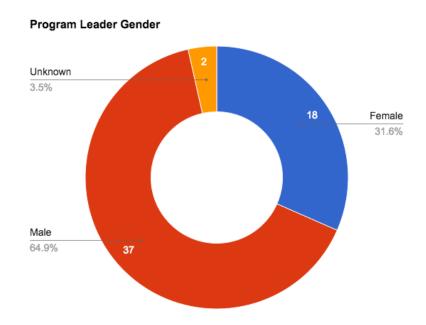


University is most common, but schools experiment

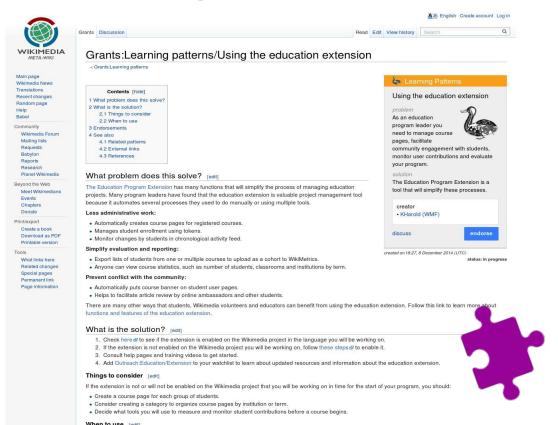


Big proportion of programs are in Global South and/or have female program leaders

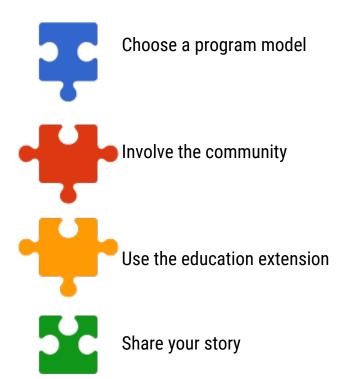




Learning Patterns → **Toolkits**



. An educator does not need to be working with a program leader or other Wikimedia volunteer to use the education extension.



Some great examples from around the world

Arab world programs

Growing content and diversity

3% of all Arabic WP content was contributed by students over the last three years.

88% of students in the last two terms were female in Egypt

WikiWomen contest produced 3.5 million bytes of new content (including 6 good/featured articles)

Tec de Monterrey in Mexico

Adjusting assignments to student abilities 7,718 files added to Commons (photos, sound, animations, charts)

WikiEd in US & Canada

Achieving scale through tools 98 classes (2,500+ students) supported on enwiki

Wiki Camp in Armenia

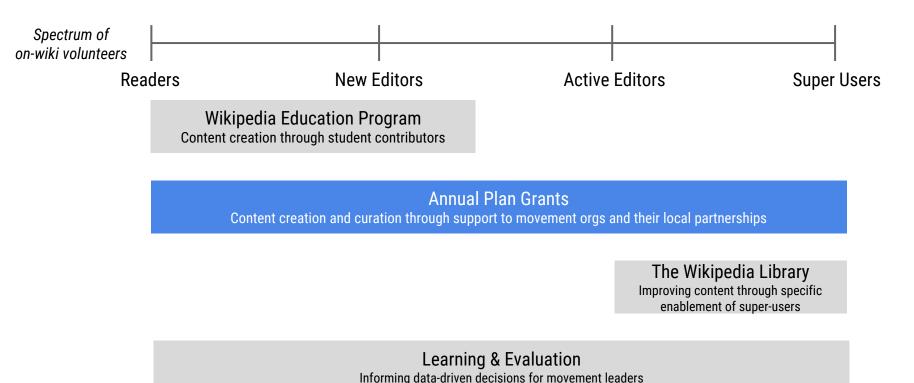
Thinking outside the classroom 13% retention of student editors

What's next for Q3 and Q4

Objective	Measure of success	ETA	Approach
Focus communities: Grow Arabic and Spanish Wikipedia through education programs	* Four locally led programs in Arab world, Mexico and Argentina to promote quality content initiatives * Explore expansion in Arab world	July 2015	* Solidify community support in Jordan * Targeted mentoring in Egypt, Mexico and Argentina * Investigate expansion into Saudi Arabia
Support and promote programs worldwide	* 10 PLs contribute to learning patterns * Increase of 15% in learning patterns in category education each quarter * 10 PLs contribute to newsletter or blog	July 2015	* Develop materials (learning patterns, toolkit) * Invite PL's to contribute to learning patterns * Monthly newsletter, blog and focused outreach activities
Provide mentorship to growing education programs	* Establish baseline for mentoring * Set mentoring goals with 5 mentees * Track progress on agreed goals with mentees	* March 2015 * July 2015 * Dec 2015	* Prioritize Global South initiatives * Expand reach through Collab mentors * Track with guidance from L&E
Keep our fingers on the pulse of education programs worldwide	* Dashboard updated quarterly * Establish baseline of resource awareness among PLs	* July 2015	* Survey PL's about resource awareness * Start tracking education portal page views * Encourage gender diversity reporting

2. Annual Plan Grants

Activities focus on supporting content growth through different segments of users



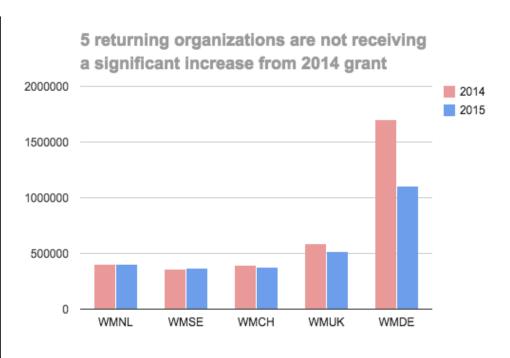
Background

Annual Plan Grants program: Q2 goals

Objective	Measure of success	ETA	Status	Notes
Shift focus from money and process to impact and non-monetary support	Impact a key criterion in FDC's rationale	Dec 2014	✓ Done	Streamlined forms and simplified reporting requirements; Emphasis on impact in the inputs to the FDC's decisions including impact analyses and staff assessments
Roll out consultation plan	Solicit input from FDC, grantees, community	Aug 2015	In progress	In development
Offer capacity building for Wikimedia organizations	More support offeredGrantees accept support	Dec 2014	✓ Done	Organizational effectiveness tool developed with strong participation from Wikimedia organizations.
External benchmarking research leads to more impact	Org effectiveness benchmarking, participatory grantmaking studies	Mar 2015	In progress	(Updated: Both studies have been completed in Jan and will be shared with the community shortly)

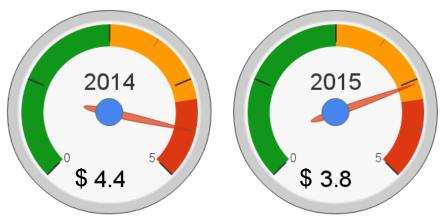
FDC deliberations R1 outcomes vs. 2014

	<u>2014</u>	<u>2015</u>	Change
Total	\$4,432,000	\$3,818,211	-14%
WMDE	\$1,750,000	\$1,102,920	-35%
WMUK	\$570,000	\$521,303	-11%
WMCH	\$400,000	\$381,150	-3%
WMNL	\$410,000	\$399,152	0%
WMSE	\$390,000	\$365,907	2%
WMIL	\$200,000	\$215,600	9%
WMCAT	\$100,000	\$107,799	11%
WMAT	\$276,000	\$299,364	12%
WMAR	\$175,000	\$212,000	21%
WMRS	\$108,000	\$129,672	23%
WMEE	Did not apply	\$83,345	-
			-
WMIN	\$53,000	Did not apply	



FDC deliberations R1 outcomes

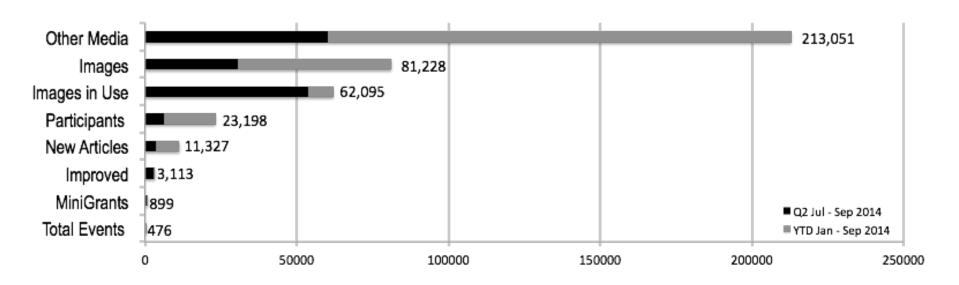
- \$3.8 million to 11 Wikimedia orgs vs. \$4.4 million to 11 Wikimedia orgs last year.
- Total amount decreased by 14%.
- The FDC *reduced* 5 largest grants by \$750k, *increased* 6 smallest grants by \$190k.



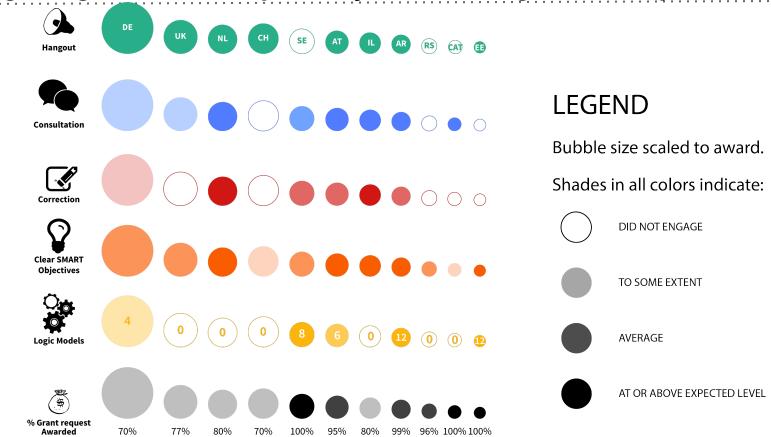
While grant requests and overall budgets have increased year after year for almost all the organizations, impact has not grown at the same rate... This is of significant concern to the FDC, particularly for the largest organizations that have considerable financial and staff resources.

- FDC funding recommendations, 2014-2015 Round 1

Outcomes reported 2014 by APG Grantees

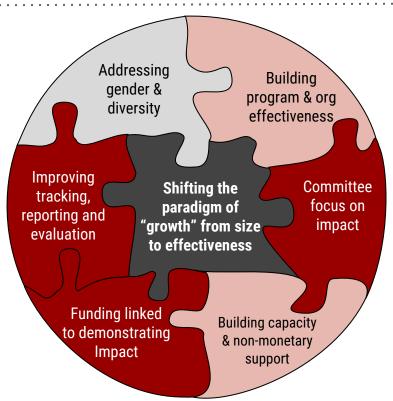


Learning together: capacity building for impact

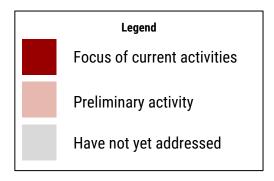


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What we learned in APG & where we're going



- Shifting the focus from growing staff, budgets, and grant sizes, to achieving more impact
- Organizations want non-monetary support
- Organizations are recognizing their potential and focusing on institutional partnerships



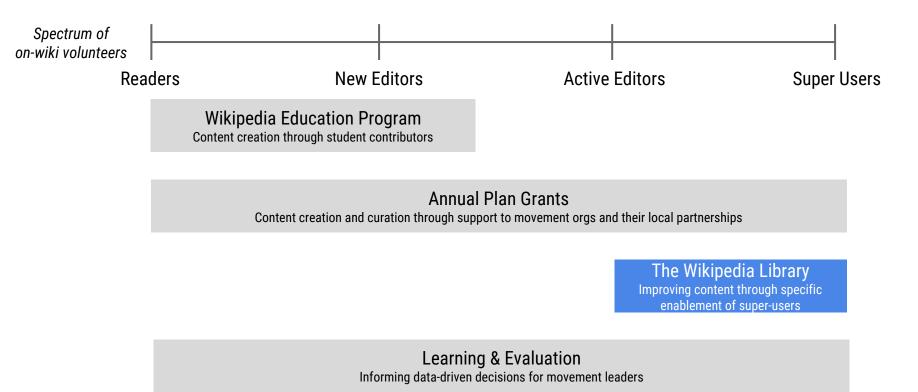
What's next: APG Q3 & Q4 goals

Objective	Measure of success	ETA	Notes
Increase impact , decrease size of grants	 Community consultation Impact analyses Grantees report on global metrics R2 decisions focus on impact 	Jun 2015	Shift to global metrics in reporting on 2015 grants
Increase non-monetary support through peer and WMF-led knowledge-sharing, mentorship, training, tools	 Participation in events and trainings, feedback Use of tools and support Contributions toward movement knowledge 	Jun 2015	 Hangouts, trainings Mentorship, exchange Org effectiveness Learning patterns Shift to global south and gender gap focus
Build a more impact- focused culture by socializing benchmarking research	Two research projects are socialized with key stakeholders in the movement	Mar 2015	 Org effectiveness research Participatory grantmaking

3. The Wikipedia Library



Activities focus on supporting content growth through different segments of users



Growth of a library











WMF Program

Trajectory: From the Community to Community Growth

IEG: supported an experimental community project

- build capacity and organization
- define specific support roles
- encourage higher-impact outreach
- focus on access

WMF: mentor and scale the program

- streamline and document processes
- onboard and training volunteers
- harness momentum to attract more partners
- lay foundation to build globally

Community Growth: cultivate global network

- support local language satellites
- respond to local needs with local leadership
- provide training, metrics and analysis, organizational expertise

Support super-users globally with access partnerships

Expand Quality Content

Superusers are prolific creators of good content

Examples:

- * JSTOR, Oxford University Press, BMJ, Elsevier
- * 37% increase in citations to partners
- * JSTOR provides access to Persian Wikipedians
- * Visiting Scholar Wehwalt creates 14 FAs

Grow Healthy Communities

Volunteer coordinators manage local projects

Examples:

- * Arabic book pilot
- * Chinese open resources catalogue
- * German De Gruyter signups
- * Chapter and WIR initiated partnerships

Empower
Communities'
Capacities and
Competencies

Support and mentorship increase global capacity

Examples:

- * Satellite setup guide
- * Initiative process pages
- * Centralized metrics
- * Successful partner pitches
- * Blogs and social media

Q2 goals and status

Objective	Measure of success	ETA	Status	Notes
High-touch focus on major journal partners	* Add 5 major partners * Add a non-English partner * 19 total partners	Jan 2014	✓ Done	Grew from 14 to 24 partners Elsevier, MIT Press, +JSTOR, +OUP De Gruyter English-German resource
Open global satellites to any community	* Add 3 new global branches * Same day global signups	Jan 2015	In progress	Added German branch Recruited 20+ global coordinators, Created Setup guide Same day signups achieved
Train volunteers to process and manage signups	* 5 new coordinators	Jan 2015	✓ Done	8 new coordinators Process pages & defined roles
Develop reference tech	* WikipeDPLA extension * Library Card Platform spec * Linkypedia 2.0 spec	Jan 2015	✓ Done	WikipeDPLA chrome extension Specced library card platform Specced Linkypedia 2.0
Outreach through presentations	* Present at 5 major conferences	Jan 2015	✓ Done	Presented at CNI, Charleston, ALA, MARAC, NY Metro, and OCLC

Metrics: The Wikipedia Library

Metric Totals (as of)	IEG 1 (Dec 2013)	IEG2 (July 2014)	WMF 1 (Jan 2015)	WMF 2 (Aug 2015)
Accounts issued	1918	2917	3725	5250
Unique users	1134	1627	2021	2500
Partners	5	14	24	35
Donation value	\$570k	\$1.4 mil	\$2.8 mil	\$4 mil
Global Branches	0	2	3	15
Volunteer coordinators	2	2	9	25
Staff (full-time equiv.)	1.25	1.5	2	2.25
Increased links to partners	n/a	n/a	14,840 (avg +37%)	20,000 (avg + 40%)

What we learned: Wikipedia Library

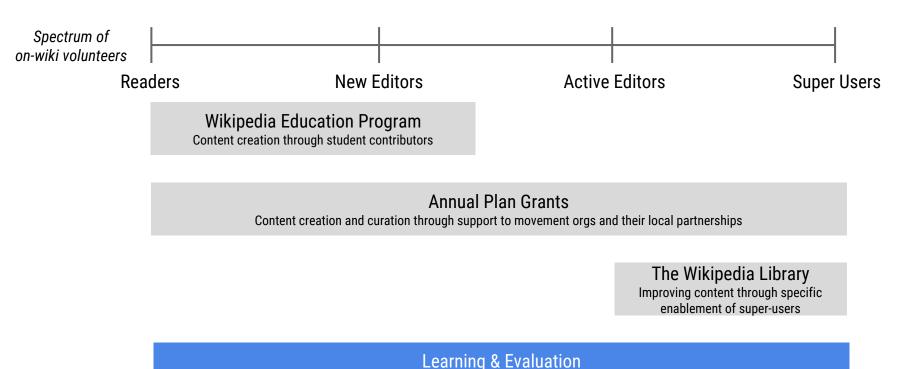
- High-touch outreach matters and outreach has scale effects
- We don't know how links are used or what resources communities have
- Global growth requires local advocates and consultation
- Specific roles and documentation permit delegation
- Scale is limited by manual processes without technical leverage
- Librarians and universities are surprisingly willing allies
- We're lacking GLAM and Open Access capacity despite demand

What's next for Q3 and Q4

Objective	Measure of success	ETA	Approach
Add major partners (including non- English) and extend reach	* Add 5 major partners * Add 5 non-English partners * 1500 users, 500 new users	Aug 2015	Use refined pitch material More editors contacting partners Leverage partners in network
Start global satellite rollout	* Add 10 new global branches	Aug 2015	Start with interested communities Customize and refine to local needs Focus: Arabic, Spanish, Telugu
Train volunteers to run own branches	* Onboard 15 global coordinators * Outreach, Comm, Technical coord	Aug 2015	Use satellite setup guide Provide metrics support
Develop reference tech	* Echo notifications built * Library Card Platform reviewed * Linkypedia 2.0 team funded	Aug 2015	Tell users they are eligible Solicit feedback from WMF tech Connect with GLAM tools
Extend our network of influence	* Present at 5 major conferences * GLAM, University, and OA coords * 5 new visiting scholars	Aug 2015	WikiConfUSA, Wikimania, ALA University Library outreach guide OCLC partnership

4. Learning & Evaluation

Activities focus on supporting content growth through different segments of users



Informing data-driven decisions for movement leaders

What we said

Learning & Evaluation

Learning & Evaluation

- 1. Global Metrics
- 2. Build capacity for self-evaluation
- 3. Improve access to three evaluation tools
- 4. Deepen data for Evaluation Reports of Wikimedia Programs
- 5. Develop Program Toolkits for at least 3 Wikimedia programs and 2 impact reports for Grantmaking programs

Learning & Evaluation

Quarterly Targets

Q1 Jul - Sep	Q2 Oct - Dec	Q3 Jan - Mar	Q4 Apr - Jun
Mapped roles and responsibilities to integrated L&E framework	Universal set of metrics and tool for organizational effectiveness	Mid-year strategy check-in and annual planning	20-25 participants in Wikimedia Conference L&E pre-conference
Evaluation Portal Redesign	Ibero Conference L&E session	Network analysis of organizations	
Follow-up evaluation of capacity from 80+ program leaders Editor survey to Arabic Wikipedia	1 New impact report for a grants campaign (Wikimania Scholarships)	Year 2 Round II Reporting	1 New impact report on grants campaign (org. effectiveness)
25 Grantees participate in Learning Day Training (Wikimania pre- conference)	Year 2 Data collection & mining (Target: 10 programs, 35 direct reporters)	2 New Program Toolkits: Education (January) Writing Contests (March/April)	1 New Program Toolkit: Photo Upload Events (June)
New learning module (Tracking and Reporting)	Global South Reader Survey	New learning module (Logic Models/Setting Goals and Targets) Guide Editor Survey for WP	New learning module (Logic Models/Setting Goals and Targets)
20% increase in Learning Patterns (Target: 60) - Launch of Question Bank (Initiate with 50 items)	15% increase in Learning Patterns (Target: 69) and questions in bank (Target: 58 items)	15% increase in Learning Patterns (Target: 80) and questions in bank (Target: 65 items)	20% increase in Learning Patterns (Target: 96) and questions in bank (Target: 78 items)

Evaluation on Program Report (beta) artnerships

Wikipedia Education Program
GLAM Content Partnerships
On-Wiki Writing Contests
Wiki Loves Monuments
Other Photo Contests
Editing Workshops
Edit-a-thons

7 Programs

119 Implementations

63 Program leaders

58 Implementations Reported

61 Implementations Mined

Evaluation Report (beta): Investment and Impact

	Wikipedia Education Program	Wiki Loves Monuments	Other Photo Events	GLAM Content Release Partnerships	On-wiki Writing Contests	Edit-a-thons	Editing Workshops
Goal	\$ to \$\$\$	\$ to \$\$\$	\$ to \$\$	\$ to \$\$	\$	\$	\$
Adding Content	*	*	\star	\star	*	☆	NA
Increasing Quality	☆	☆	☆	\Rightarrow	\bigstar	×	NA
Recruiting New Users	*	*	☆	NA	NA	☆	*
Retaining New Users	NA	☆	*	NA	*	Å	

Note: Darker shading, and larger star size, indicate greater impact observed in goal area; \$=Low; \$\$=Moderate, \$\$\$=High investments reported.

NA: Not Applicable as it is not a priority outcome targeted by most program leaders of these programs File:Evaluation_Report_(beta)_Poster_Wikimania_2014.pdf By JAnstee (WMF) (own work) [CC BY-SA 3.0], via Wikimedia

Round I Next Steps

We needed:

- More data and better data.
- 2. **Improved tools** to gather better metrics
- 3. Consistent metrics to help locate good practice for programs
- 4. For program leaders to **be bold** and **experiment** with different implementation models **and share** evaluations.

What we did

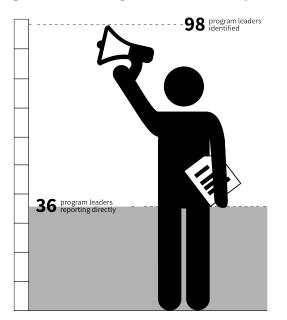
Learning & Evaluation: Programs Impact

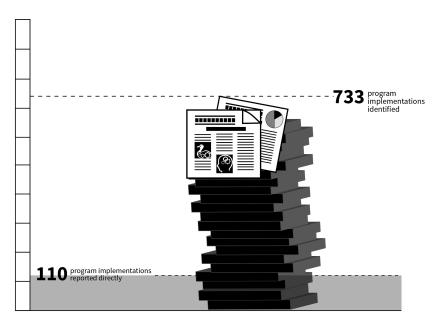
Round II Data Collection Q3 Target: 10 programs, 35+ Program Leaders

Objective	Measure of success	Dependencies	ETA	Status
Second round of voluntary reporting data collection				
More data: Data mining Increase program implementation data for a greater number of programs (10 in 2015)	Greater number of implementations than round I (>119)	STAFF Recruited 2 fellows	Dec 2014	✓ Done
More data: Outreach (1) Qualtrics collector (2) Follow up with PEG grantees & non-grantees to fill mining gaps	Data reports from at least 35 program leaders on more implementations than Round I (>58)	Community response Grantees Non-Grantees TOOLS	Nov 2014 - Feb 2015	✓ Done Already received data from 36/98 program leaders on 110 implementations
Better data (1) Targeted outreach for strong APG programs and key metrics (2) Define and obtain metrics for data gaps	- Assess quality ratings and retention - Increase in program leader adoption of metrics and reportability - Improved evaluation reports and identification of impactful programs	Wikimetrics Quarry GLAMorous CatScan2	Dec 2014 - Feb 2015	In process

Programs Impact Evaluation Round II

Since October 2014 open reporting and **thorough** mining of project pages and grantee reporting.



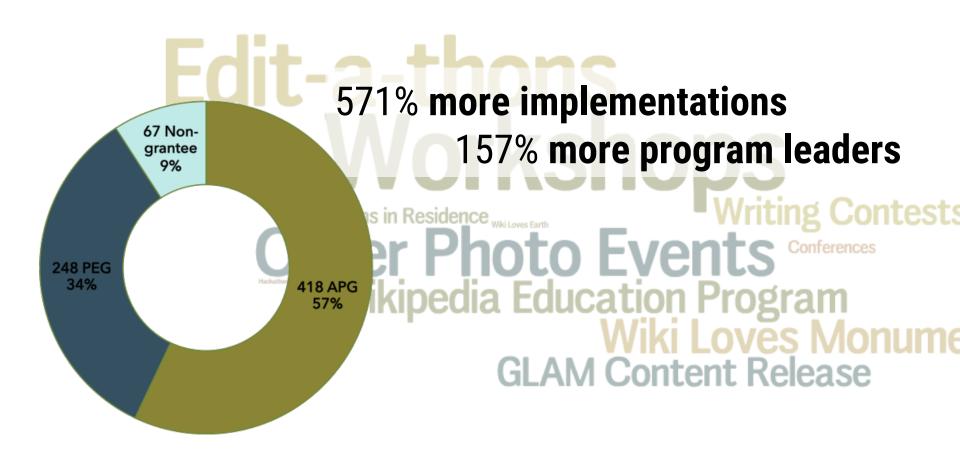


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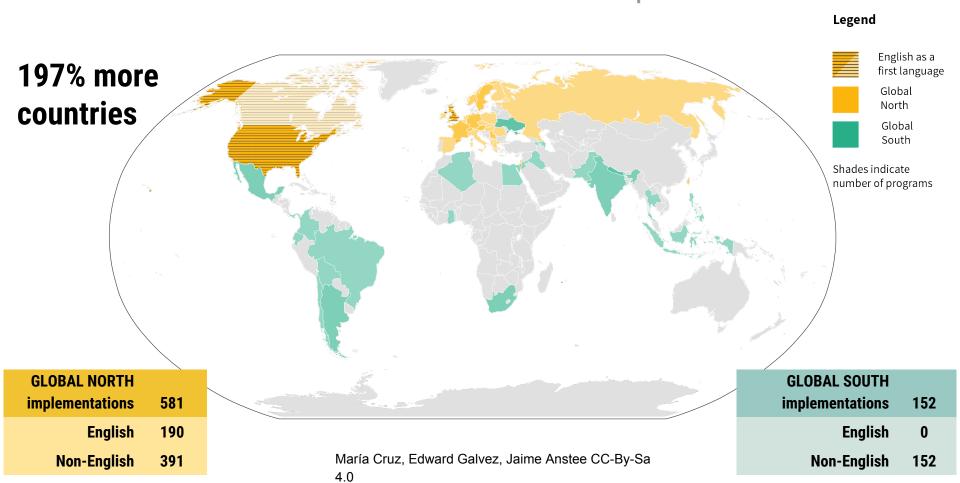
What we learned (so far)

Learning & Evaluation: Programs Impact

What we learned: We captured much more data



What we learned: We reached farther and deeper to 59 countries



Metrics and accomplishments: Data capture & reportability

Of the 733 Implementations identified and mined we have found that the participation and content

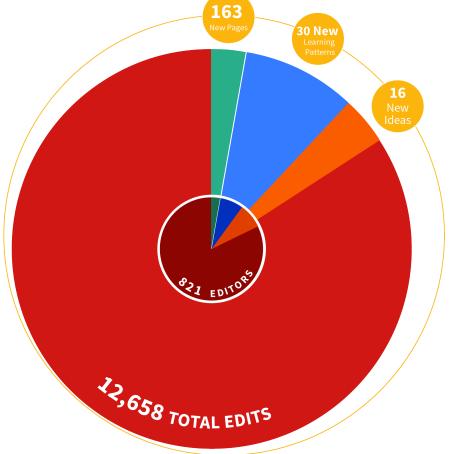


More Metrics and accomplishments:

L&E Mentoring & Resources

- Programs Mapping and Report Mining (October December 2014)
- Education Toolkit Project (September 2014 January 2015)
- APG Targets Mapping and Input (October 2014)
- Virtual Series on Storytelling (October-December 2014)
- Learning Pattern Library Curation (November 2014 January 2015)
- IberoConference L&E Workshop (November 2014)
- Community Communications and Coordination (On-going)

Multiplying learning: community engagement on the L&E portal



Colors indicate domain

Grants:Other

Evaluation Portal

Learning Patterm
Library

IdeaLab

* All portal activity, by community and Grants team members.

Maria Cruz, Edv.

* Anstee CC-Bv-S

María Cruz, Edward Galvez, Jaime Anstee CC-By-SA 4.0

What's next

Learning & Evaluation: Programs Knowledge,

Design & Toolkit Development

Q3 & Q4: Analysis, Reporting and Dissemination

Objective	Measure of success	Dependency	ETA	Status		
Second round of voluntary reporting data collection						
More data: Outreach (1) Follow up with grantees & non-grantees to fill mining gaps	Data reports from at least 35 program leaders on more implementations than Round I (>58)	Community response Grantees Non-Grantees	Nov 2014 - Feb 2015	Non-grantees & certain PEG completed December 2014		
Better data (1) Targeted outreach for strong programs and key metrics (2) Define and obtain metrics for data gaps	Assess quality ratings and retention Increase in program leader adoption of metrics and reportability Improved evaluation reports and identification of impactful programs	TOOLS Wikimetrics Quarry GLAMorous CatScan2	Dec 2014 - Mar 2015	Already received data from 36/98 program leaders on 110 implementations		
Report Dissemination and Toolkit development						
Promote Effective Programs Complete 3 reports: Wlki Loves Monuments, Photo Contests, and Editing Contests	(1) Series of blogs and meet-ups on programs impact findings (2) Program toolkits for Education, Writing Contests, and Photo Events**		Mar 2015 * Apr 2015 ** Jun 2015			
Staggered release of remaining program reports	Series of blogs and meet-ups on programs impact findings		Mar 2015 - Jun 2015			

Growth Team Asks

Continued growth in interdepartmental alignment with Engineering Product and Analytics for:

- Wikimetrics development
- Education Extension / Campaigns support
- TWL notifications, link-metrics and Library Card guidance

Questions and Discussion