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tools for organizers

The Foundation's 2018-19 annual plan recognizes organizers as ["fundamental implementers" and a "core asset"](#) of the free-knowledge movement. But tools that support organizers' efforts are frequently ad-hoc, poorly documented and not universally available—particularly to smaller communities. As the movement puts an increasing emphasis on knowledge equity, the need to understand and support movement organizers is more vital than ever. This white paper is an early effort to analyze and document organizers' main areas of need. This examination will be followed and deepened soon by the annual plan-mandated [Movement Organizer Study](#).

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Who are organizers and what do they contribute?

For the purposes of this analysis, a "movement organizer" is a anyone who purposely seeks to motivate, attract and/or direct volunteer attention. Some organizers work independently, possibly having been trained by more formal groups. But most operate within the framework of various structures that support their efforts, to wit:

➣ Chapters are legal, nonprofit entities incorporated primarily on a per-country basis, with a few exceptions (e.g., New York and DC chapters). There are about 40.
➣ User groups are not legal entities. They may have a regional or thematic focus (e.g., Community User Group of Greece, Wiki Medicine). There are about 100.
➣ WikiProjects are online groups who organize unofficially around either subject areas or types of task (e.g., copyediting). They can exist anywhere, and go by different names on different wikis (e.g., "Portals" or just "Projects"), but are concentrated on en.wiki, where about 300 are currently active.
➣ Campaigns are unaffiliated working groups, usually in part supported by organizers at existing affiliates, which run widespread activities, such as Art+Feminism, Wikipedia Asian Month, or Wiki Loves Monuments
➣ Independent Organizations a number of individual organizations exist on the edge of recognized groups within the movement.

Typical Activities

➣ Content creation: E.g., content drives, editathons, photo expeditions, writing competitions
➣ Knowledge dissemination: E.g., training events, conferences, communications campaigns
➣ Process improvement: E.g., standardization of sources, procedures, style guides, templates
➣ Lobbying, partnerships, outreach (esp. GLAMs, governments, NGOs, etc): The province of the chapters and some affiliates, who work to improve laws, negotiate content donations, conduct professional outreach and training, etc.

Who is NOT an organizer for our purposes?

Wiki "functionaries" such as stewards, admins, and bureaucrats, whose activities generally don't encompass "attracting and directing volunteer attention," to use our earlier definition.

Problems and Needs

Tool Discovery, Documentation, Ease of Use

I've listed this meta-problem first because it applies to every section below. Tools exist to at least partially address virtually all problems this document describes, but their existence is often unknown to organizers. They also often require technical knowledge to set up and operate—yet are poorly documented. As one organizer put it, "There are a lot of

tools we don't know about or know what they can do for us. We need someone to help us understand what we are missing, and what to do and how to do it."

- Lack of a standard organizer workflow: There is no step-by-step process that organizers can follow to create a new project or campaign and make sure that it will be successful. Efforts to document existing processes have been made, but guides were created by volunteers or just for one wiki and are not easy to find or kept up to date. As one staffer put it, "We need to give people the scaffolding of how to be successful."

- Lack of end-user documentation: A lack of end-user (as opposed to technical) documentation often makes the tools organizers do locate unusable. As one staffer put it, "We need someone's time to document this stuff for mortals."

- Need for technical skills: Most organizers do not have technical backgrounds. So the bots, scripts, Wikidata tools and other technologies that benefit some groups enormously are not available to all. This problem can be particularly acute in smaller communities, where it is less easy to find people with the required skills.

Community-Building Tools

"Community-building" refers to a nexus of functions that organizers require to inform, engage and motivate their communities—to build, as someone said, "a movement not an event." Performing these functions currently requires a patchwork of tools, a high level of technical sophistication and much manual effort. Key community-building functions include:

> Group conversations: Groups need better ways to share and discuss information among themselves. Organizers need easy ways to make announcements and invite large numbers of people to participate in a discussion. Group members need to be able to subscribe to to discussions at various levels of both granularity and volume: they need to subscribe to individual topics, instead of just overall pages; they also want more control over just how they follow topics—getting notified, for example, about every development in select areas but only about entirely new topics in areas of less interest. Safety is also a concern, particularly for groups that organize around sensitive topics, such as women's issues. The ability to declare some discussions invitation-only would be one way to manage these concerns.

> Group events: Organizers want an easy way to announce an event and find out who is going to come.

> Task management: Setting out work for a community to accomplish is a core organizer role, yet the wikis lack even the most basic functions of task-management software. There is no way to subscribe to a task, in order to follow its progress; to classify a task, so as to provide meaningful ways for users to choose one that suits them (e.g, no way to classify by level of effort); no

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dedicated discussion thread attached to a task; no way to claim a task, in order to avoid conflicts. Moreover tasks that exist outside the wiki are not easily tracked (e.g., getting decentralized support on a

communications plan, solicit support for event organization, or other "jobs" that don't require on-wiki activities).

> Relationship management: Who in the Foundation has successfully worked with an important partner organization? With whom did they work? What is our contact at that partner's area of expertise? The answers to these and a host of other questions represent valuable business information. Yet we have no organized way of preserving or sharing this data.

Outreach and Promotion Tools

The Community-Building tools above speak to a need for more effective communication within a group. But organizers also need to reach editors, readers and others who are not yet in their circle of contacts.

Event and group promotion: There is currently no simple or effective way for organizers to promote their groups or events to wiki readers or editors who are likely to be interested (e.g., based on geography + demonstrated subject interest). This clearly hampers these groups' ability to grow. A founder of one of the largest and most active user groups recently named their inability to reach out beyond a circle of existing, very active users as one of his biggest issues with current tools. Tools like [CentralNotice and its various subspecies exist](), but lack important features. Geonotice, for example, can target by location but reaches only registered users and only on their Watchlists. CentralNotice and Sitenotice reach readers, but have no targeting features. Such tools are also subject to [many restrictions and layers of approval]().

> Recruiting new members and matching needs with skills: Finding new members is slow and often accomplished through personal networks. As one staffer and

organizer put it, "You have to find out how to find the people. Then find the people. Then invite the people one by one—it's a ton of work." Ways are needed to connect groups with volunteers and potential volunteers who share their passions. Ways are also needed to match groups with volunteers who possess needed skills, such as bot writing or conference planning ([Connect]() is one model of how this can be done).

> Beyond email and talk pages: Email is the only message-delivery mechanism outside talk pages that our system currently supports. But the world we live in now requires that organizers broadcast and stay in touch with members on multiple social-media platforms at the same time. Feeding these multiple platforms manually is labor intensive.

> Challenges in this area: Meeting organizers' promotional needs may require us to reconsider some longstanding ideas and prohibitions. We may, for example, wish to experiment with limited, noncommercial, movement-focused advertising to wiki readers. Given the wikis' enormous

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traffic, even narrowly focused banners might prove effective. But stepping up activity in this area would require at the same time a new type of (possibly technical) oversight, to make sure the level of promotion is not excessive, and a streamlining of existing community processes. There may also be ways for us to respect editors' privacy while still targeting them with messages based on geography or demonstrated subject

interest (or editors might be requested to voluntarily submit such information).

A better method for tapping subject interest

Research and experience tell us that an abstract interest in the movement per se is not what motivates volunteers at the beginning of their wiki journey. They come to us initially to share their knowledge and passion for some subject. A glance at the [Wikiproject directory](#) demonstrates the wide range of interests organizers and volunteers pursue formally, from folklore to pharmacology, football to firearms. Such projects are seriously hampered, however, by the fundamental weaknesses of the wiki category system [1], our primary means for classifying content by subject.

A world of applications: We need to be able to more effectively exploit metadata about article topics and quality and about wiki tasks. The possible applications for organizers of such a system are almost limitless. Broadly speaking, organizers need automated ways to classify (and therefore assemble and search for) articles and tasks by subject, and to reach out to potential participants based on demonstrated subject interest.

Event-Management Tools

Organizers of ediathons, training sessions, photo walks and similar in-person events have needs related to event management. Event organizers' existing workflows are rife with manual processes, workarounds and duplicated effort ([partially documented here](#)). The [Event Metrics](#) project currently in development will aid event organizers with better data about their contributions, but event management is out of scope for that project. An opportunity exists for synergy between Event Metrics and future event-management tools, since both make use of similar input data about the event and it's participants.

> Participant signup and sign-in: No system exists for acquiring and storing advance event-registration data or for checking-in users on the day of the event. Privacy issues will complicate any solution (because participants must supply email); not solving the issue, however, forces organizers to employ third-party tools (e.g., EventBrite), subjecting participants to commercial privacy practices.

> Wiki account-creation, day of: This is an urgent problem that should be addressed. For security reasons, the wikis allow only a limited number of accounts to be created from one IP during a given timeframe. This creates significant issues for event organizers on the day of, since it's common for participants to show up with no wiki account. There are workarounds, but

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they are not universal or well known. And even when experienced organizers follow all the best practices, participants still get blocked. ([Potential solutions](#) are discussed in this ticket.)

> Conference Tools: According to Program staff, we rebuild the infrastructure every year for conference calendaring, signup, payment, scheduling etc. More directly linked to on-wiki activities may be the tasks related to sessions, including proposal submission, scoring of submissions, scheduling, and presenting scheduled programs on wiki.

Recommendations

The broad survey of organizer needs above will be useful, I hope, for product teams,

who are largely unfamiliar with organizers' activities, having done little work on this area up to now. But we obviously can't move on all the fronts described. The Movement Organizer Study, soon to commence, will give us much more data on which to base product decisions. In the meanwhile, however, as a starting point, I offer the list of recommended priorities below, based on my limited investigation.

These problems are those whose solutions would, it seems to me, most deeply impact organizers' effectiveness. As befits goals for a 3- to 5-year horizon, the fixes to most of these problems will not be trivial. But, for the most part, neither will the benefits of those fixes be limited to organizers. "Subject interest" and "Group conversations", in particular, are fundamental technologies whose potential applications are widespread.

> [Group conversations](#): Talk pages may not be the only way to address organizers' communication needs. But "fixing talk pages" is on our organizational agenda already. In the coming months, the annual-plan mandated [consultation about "fixing talk pages"](#) will initiate a conversation about the shortcomings of this core wiki communication platform. If we make an effort during that process to understand the particular needs of organizers, I'm confident solutions can be incorporated into our plans that will help organizers keep their groups engaged and informed. An important area for discussion will be whether we should incorporate social-media channels into our notifications system.

> [Event and group promotion](#): Better outreach and promotion tools would enable organizers to more effectively reach desired audiences in order to spread the movement. Overcoming the problems associated with using the wikis for mission-focused promotion

will require efforts in both the technical and social arenas. But, given the enormous traffic the wikis command, failing to tap the communication potential of our platforms would be an enormous opportunity missed.

> [A better method for tapping subject interest](#): Subject interest is a key motivator of wiki activities. Providing simpler and better ways for organizers to automatically assemble tasks and perform outreach based on subject will pay dividends in increased efficiency

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and effectiveness across a wide range of activities. By most accounts, revising and reforming the category system itself is unlikely to be the fix to this problem. Future solutions may come from experiments currently ongoing with structured data, AI projects like [ORES Draft topic model](#), or from a system based on link analysis, like the one that powers [Recommendation API](#).

> [Tool Discovery, Documentation, Ease of Use](#): Our tools are hard to use and install, yet they are poorly documented—a bad combination. They are also hard to discover. The Technology team already employs one staffer whose job is documentation. Maybe it's time to consider more such positions, with staffers acting to mobilize, organize and standardize community writing about best practices and model workflows. As to discoverability, various efforts [exist](#) on this front already. The [Toolhub](#) project is an attempt to survey these past events and create a new, model tool-discovery platform. Among other improvements, it adds [much more data](#) about key

questions users have, like whether the tool is broken and what wikis a tool works on.

> [Wiki account creation, day-of](#): This is something we should address in the near term. [This ticket](#) includes a good discussion of solutions. The [favored fix](#) involves a change to the Event Coordinator right that would probably require community approval. In addition, that right is not available on all wikis, so some thought should go into how to make it more universal.

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Notes

[1] A few of these weaknesses: Categories are monolingual, ad-hoc and completely nonstandard, so developing universal tools based on them is challenging. Items in sub-categories don't inherit from parents, which is why searching broad categories typically yields few article results, contrary to user expectations. This non-inheritance also leads to hyper-specificity and bloat, to the point of absurdity. Technically speaking, the category system is not a "taxonomy"—a logical structure where all child categories are more specific classifications of the parents and wholly contained by them (e.g., Musical Instruments > String Instruments). It is, instead, a "category network," where children have some relationship with parents, but the relationship is unpredictable and therefore less useful (Musical Instruments > Orchestras). Categories can even be circular, with one category being both a parent and a child of itself.

Sources

Joe Matazzoni : Research and Insights Other contributors[1]: A. Bartov, T. Bolliger, M. Cruz, J. Hare, D. Horn, J. Katz, J. Minor, T. Negrin, M. Novotny, N. Pargarkar, J. Seddon, A. Stinson, N. Wilson, L. Zia

Research about editathons and other in-person events

- Eight organizer interviews: As part of the research into the ongoing Event Metrics project, I conducted about 12 hours of interviews with seven event organizers suggested by program staff. (I also received one written interview.) These interviews, for which I have extensive notes, cover the full workflow of event creation, management and reporting. I did not ask subjects for the right to publish but could request if desirable.
- Extensive talk page discussion: Also as part of Event Metrics, I've engaged extensively with organizer on the project talk page. (The discussion is organized by subject. E.g., here on the problems associated with Account Creation.)

Research about movement organizers generally

- Movement Organizers: Initial findings from Wikimania Interviews, is a slide deck from Alex Stinson and Abbey Ripstra (checking to see if I'm allowed to link to this yet).
- Staff interviews: with program and other team members: Alex Stinson, Maria Cruz., Asaf Bartov, James Hare

Exploring the Relationship between Reading Habits and Aesthetic Preferences in Different Cultural Contexts and Design Practices

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[1] If your name was left off the list by mistake please contact JMinor or MNovotny