Organizational Efficacy

Objective:

Implement organizational best practices to improve the effectiveness of how the Foundation achieves its targeted outcomes

Three Organizational Efficacy efforts are underway this quarter including: sustainability, staff rewards, remote work culture.

For sustainability, we continued work with external vendor, Strategic Sustainability Consulting, to develop our impact statement which includes our framework, strategic roadmap, and identification of metrics to be assessed annually.

For staff rewards, vendors for both manager-to-report and peer-to-peer rewards were identified, procurement initiated, award qualification guidelines defined and submission process drafted.

For remote work, we will kick off assessment of staff needs during All Hands and develop recommendations for leadership consideration.

Key Results

<table>
<thead>
<tr>
<th></th>
<th>Y1-Goal</th>
<th>Q2-Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliver three sustainability milestones: policy statement, framework, KPIs</td>
<td>3 milestones</td>
<td>3 milestones completed</td>
</tr>
<tr>
<td><strong>Baseline:</strong> 0 milestones</td>
<td></td>
<td></td>
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<tr>
<td>Deliver three staff rewards system milestones: process mapping, pilot, implementation</td>
<td>3 milestones</td>
<td>1 milestone completed</td>
</tr>
<tr>
<td><strong>Baseline:</strong> 0 milestones</td>
<td></td>
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<tr>
<td>Deliver three remote toolkit milestones: survey, recommendations, toolkit</td>
<td>3 milestones</td>
<td>milestones in progress</td>
</tr>
<tr>
<td><strong>Baseline:</strong> 0 milestones</td>
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Department: Operations
Organizational Efficacy

Sustainability
- Release of impact statement
- Consolidation and prioritization of efforts with direct and indirect environment impacts
- Upcoming kickoff of Sustainability Consortium
- Levers for shrinking our carbon footprint: data center, travel, office

Staff Rewards System
- During pilot we will assess usage, types of recognition, cost per reward, and administration overhead
- Recognition in the areas of: Performance, Values, Leadership Practices, Growth

Remote Toolkit
- Development of recommendations for: workspaces, collaboration, connectivity, community
- Combination of guidance and investment
**Objective:**

Establish practices to deliver discipline and consistency to Foundation processes and operations

In the Operational Rigor space we explored improvements to our quarterly Tuning Sessions.

We surveyed staff for feedback on the following topics, resulting in the identification of quick pivot wins for Q2:
- Awareness of sessions
- Templates and documentation
- Training and preparation
- Session execution

**Key Results**

<table>
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<th>Y1-Goal</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Deliver four quarterly Foundation metric reviews</td>
<td>4 milestones completed</td>
</tr>
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</table>

Baseline: 0 milestones

Department: Operations
Tuning Session

- Quick pivot improvements
  - Recordings Q&A inclusion
  - Advance C-team review
  - Extended slide deck lock window
  - Improved template guidance
  - Sharing action items with staff
Objective:

Analyze, implement and improve Foundation practices which advance staff capabilities to lead, inspire, empower and innovate

This quarter’s Leadership Practice work has been primarily focused on preparations for All Hands.

We are committed to investing in staff via a week of collaboration, leadership development, organizational alignment and the opportunity to get to know one another better through work, fun activities and celebration.

Our expectation is that through this convening, our staff will feel valued and supported, and will leave inspired, connected as colleagues and embracing the leadership practices highlighted by the experiences during the meeting.

Key Results

Deliver two All Hands milestones: event design and execution within budget

Baseline: 0 milestones

<table>
<thead>
<tr>
<th>Department: Operations</th>
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</thead>
<tbody>
<tr>
<td>Y1-Goal</td>
</tr>
<tr>
<td>2 milestones</td>
</tr>
</tbody>
</table>
Leadership Practices

All Hands
- Partnering with F&A, T&C and our Chief of Staff on execution
- Event consultant and staff volunteers identified and engaged
- $1M investment focused on delivering:
  - Remote workforce engagement
  - Face-to-face collaboration on work deliverables
  - Organization development
  - Training on best practices
  - Celebrating our people and having some fun

Department: Operations
Resource Stewardship

Objective:

Ensure resource expenditures are aligned to Foundation priorities and are prudently utilized through maximized performance output

Our Resource Stewardship efforts have been focused on making improvements with our annual planning process.

By evaluating our conversations with C-team leadership, reflecting on feedback we’ve received from staff, and assessing our previous planning cycles, we are seeking to make thoughtful modifications to better our planning process, honing in on:

- Alignment
- Clarity
- Accountability
- Efficiency

Key Results

<table>
<thead>
<tr>
<th>Y1-Goal</th>
<th>Q2-Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliver two annual planning improvement milestones: development of framework for work beyond the MTP and updated planning process</td>
<td>2 milestones</td>
</tr>
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Resource Stewardship

Annual planning
- Improvement themes
  - Continuity of planning: How our work builds and leverages prior work
  - Program/project prioritization: Identifying organization objectives before detailed analysis
  - Resource expectations: Setting clear expectations for allocation
  - Defining work in support of MTP: Vision workshops
- High level updates
  - Efficacy and Excellence Framework
  - Process sequencing
- Where to learn more
  - January - All Hands Leadership Delegate session
  - February - Purpose built meeting for Budget Managers and interested staff
New Colleague

Thomas VanEtten
North Carolina
Continuous Improvement Project Manager

Department: Operations
Operations is currently engaged in three cross-departmental activities focused on Enterprise Risk Management (ERM), Opportunity Fund, and System of Performance

- **ERM Iteration 1, partnership with Legal, Tech and F&A**
  - Risk framework
  - Risk taxonomy
  - Risk treatment options
  - Risk register
  - Tooling to support above functions

- **Opportunity Fund, partnership with F&A**
  - Continued oversight and decision making on new projects/work that advances our program goals and MTP

- **System of Performance, partnership with T&C**
  - Development of compensation philosophy: impact to mission, reflecting our values, transparency, inclusivity
Learning & Evaluation

Business Intelligence
Developing systems to monitor MTP metrics so staff have data for decision-making.

Thriving Movement metrics reporting
- We collected baseline data for 5 of the 7 Thriving Movement metrics that L&E owns.
- Plan to adjust the metric about campaigns to measure impact of campaigns rather than organizer perceptions.
- Plan to report on the knowledge gaps metric, and need until the end of Q4 to decide on a uniform method of data collection across 3 different teams at the Foundation.

Affiliate compliance & recognitions monitoring system
- Reporting portal for affiliate compliance and recognitions is fully automated, public-facing and available on Meta
- In Q2 AffCom recognized 7 new user groups (3 in Russia, India, Haiti, Mali and an intl stewards group)
Learning & Evaluation

Program Evaluation
Measuring impact on leadership development & movement diversity.

Events Impact Evaluation
- Training of Trainers: 7-month follow-up survey complete
- Learning Days: Pre-workshop survey, Post-workshop survey, and 1-month follow-up complete
- Wikimania: Post-conference survey and 3-month follow-up complete

Affiliate Monitoring & Evaluation System
- 2020 Affiliates Data survey was designed - deployment in Q3
- Affiliates Data Portal and related query forms on track for launch in early February

Grants Impact Evaluation
- Hiring an evaluator for grants impact in Q3
Community Research
Conducting and compiling research about our Wikimedia communities’ gender, age, education, geographic, and language diversity & equity.

State of our Wiki Communities Report
- Outline developed; paused for now.

Equity Index
- Mock-up contains longitudinal data from more than 20 global equity indices, MoM reader/editor data, and historical affiliate and grants data. (screenshot to right)

Community Insights
- 2,589 Wikimedians responded and completed at least half the survey. Analysis is now underway. Prelim data will be shared Feb, and formal report comes in March.
Community Events

Strategic Convenorship
Developing a thriving ecosystem of movement events that serves a global, inclusive and diverse community

Wiki Indaba
- Strategic leadership with Wiki Indaba Steering Committee (WISCOM) in the development of the regional conference. Focus of deliverables: Risk and Accountability, Fiduciary Stewardship, Grant Acceptance, Regional Development, Evaluation.

Funding of movement events in 1st round
- Queering Wikipedia: a partnership of first time event organizers in a collaborative setting: WMAT & LGBT+ UG
  - Art + Feminism Japan 2020 @Japan
  - Hindi Wiki Conference 2020 @ New Delhi
  - Wikidata Days 2020 @ Portugal

Wiki Indaba by the numbers
- 63 participants from 23 different countries, 18 with the region
- 13 staff members
- 38% Women participation
- 50 scholarships awarded from 18 countries
- 17 international
- 15 African continent
- 40% Women
- 79% conference program satisfaction
- 100% organization team support and conference logistics.
Community Events

Technical Events
Maintaining the engagement of global technical communities through the curation of physical spaces in which collaboration and creativity are fostered.

Volunteer initiatives
- Event designed around Developer productivity in collaboration with Engineering Productivity, Contributors Team, Technical Engagement.
- Major decisions have been made serving volunteer initiatives in the areas of; People and Processes, Standardization, Deployment and Hosting, Testing, Local Development and On-Boarding

Operational efficiency:
- Created a strong Cross Departmental working proposal with Technology (VP & CTO) for Technical Events (CTO) in an attempt to navigate the difficulties of budget ownership.

TechConf by the numbers
- 66 participants from 24 countries
- 22% Women participation (2% above average for technical events)
- 97.2% had a positive or very positive overall experience,
- 52.8% - long needed decision or agreement, that I have been struggling with, has been made because of the event
- 100% agree that the opportunity to meet fellow developers was valuable
- 14 volunteers were awarded a scholarship from 12 countries
Event Management
Executing a professionally organized Wikimania experience for community that can be adapted on a global scale, while achieving efficiency in Foundation-wide event operations.

Project Debriefs & Process Improvement
- Lead project debriefs for 2019 Wikimania with internal and external stakeholders; produced lessons learned and implementable solutions for 2020
- Partnered with Finance (procurement) to jointly drive negotiations in Bangkok with major vendors with an eye on cost efficiency.
- Registration and Scholarship application system overhaul
- Coming up next: Final agreement - signing with major vendor for lodging and event needs for 2020 Wikimania

Event Evaluation
- Organized event evaluation and data review with Wikimania 2019 hosting affiliate
- Next in Q3: community focus group to provide input on impact evaluation of Wikimania
Recognition

“Queering Wikipedia” - 1st ever Wiki LGBTQ+ Conference 21–24 May 2020

Chen Almog
London
Program Officer Conference & Event Grants