WIKIMEDIA FOUNDATION

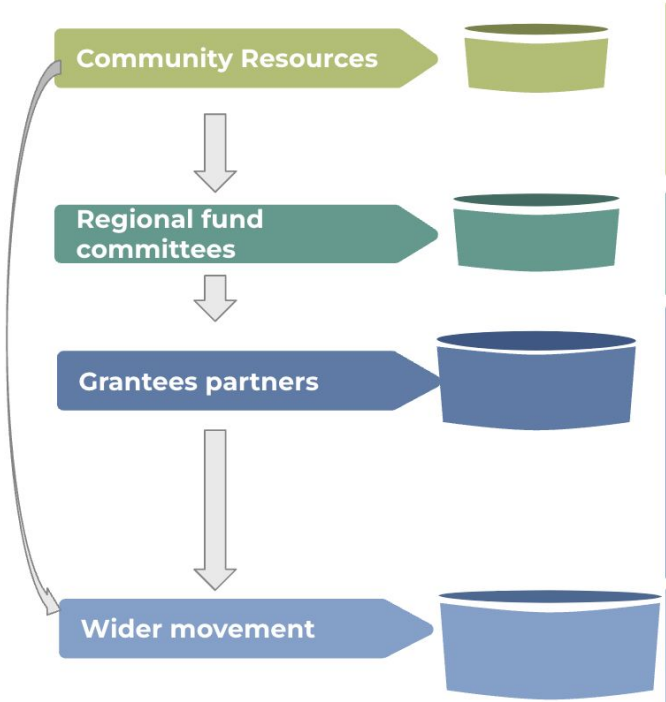
# Feedback report:

## Learning form Regional Fund Committees and General Support Wikimedia Funds applicants

Round 1 & 2, fiscal year 2022/23

# Executive summary

This is a summary of feedback received from 49% of Regional Fund Committee members and 60% of General Support applicants in the fiscal year 22/23. This feedback process is part of the Community Resources team learning and evaluation framework that seeks to learn from the team's t**heory of change**:




If **Community Resources**, through the new funds strategy will:
- Bring in new a diverse grantees
- Provide thought partnership
- Foster a learning culture
- Share decision-making power
- Build capacities in Regional Fund Committees

Then **committees** will feel empowered and well equipped to make impactful funding decisions and support grantees

Then **grantees** will be more able to:
- Improve program delivery and innovate to bring in more and diverse contributors
- Strengthen internal and/or organizational capacities and leadership
- Grow, sustain and diverse communities, especially underrepresented groups
- Engage in peer learning
- Build strategic partnerships

Through grantees work we hope to see changes in the wider **communities and movement**.
- Diverse growth in contributors and content
- More peer learning and collaboration
- Greater sense of engagement and investment

# What's going well and  we can keep doing?

**For Regional Fund Committee members (RFC):**

- After two years of learning and iterating the funding review process **there is a feeling of increased capacities and autonomy.** Better staff reviews and management of the review processes has been key.
- Year 1 showed the need for **building greater trust** between the Community Resources team, the RFC and grantee partners. There are signs this is increasing through more interactions, better communications and openness to share critical opinions.

# What's going well and  we can keep doing?

**For Wikimedia Fund applicants:**

- **Most useful support has been 1:1 conversations and guidance** provided by Community Resources Program Officers. This support as also built trust to discuss sensitive issues or critical views.
- **Continuous conversations** with Program Officer have been useful for grantees to feel that they are supported **during grant implementation**, as well as regional collective learning spaces.
- **More interactions with RFCs** has allowed grantees to feel more trust in their capacities to make funding decisions and their knowledge about grantees' work. Also, increased empathy for their task and the time dedicated to this.
    - Just over 50% see this a favourable model over a global committee or WMF making funding decisions.

# What we can improve and focus our attention on:

**Regional Fund Committees request:**

- More **clarity around overall yearly budgets** assigned by WMF and the rationale behind this.
- Rounds that allow **more time** for reviewing documentation
- **Practical guidelines /benchmarks** around reviewing budgets and metrics
- **Conversations with grantees** earlier in the rounds.
- **Time to support grantees beyond rounds** (less than 50% do this). They view this as key to building trust and making better decisions. .
- **WMF to organise learning spaces** between committee members.
- Support to interact with **Movement Strategy spaces** discussing future funding models. RFCs feel they have built capacities to participate more actively, but still desire more empowerment in these spaces.

# What we can improve and focus our attention on:

**Applicants require from WMF:**

- **Anticipated communication** about dates and requirements, as well as better alignment with affiliates annual approval processes.
- More transparency around **the criteria WMF uses to distribute funds** to each region and how this ensures equity.
- Clearer **budget guidelines**
- Better support in the **definition of metrics**
- More **contextualised orientation** and support from the WMF for smaller groups and newer applicants
- More capacity-building services from WMF, beyond PO conversations
- **Thematic Funding Committees** for non-regional based proposals.
- Consider the RFC role to not be purely volunteer-based if they are expected to support grantees beyond funding decisions.

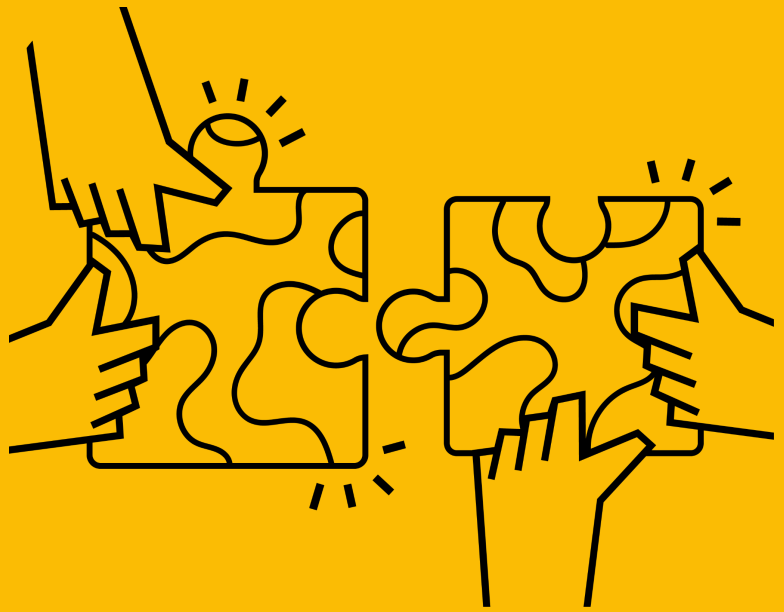
# What we can improve and focus our attention on:

## Applicants require from RFC:

- **More structured conversations with RFC** earlier in the rounds and between rounds to support implementation and longer term thinking.
- **Better feedback** from RFCs: **44%** of applicants still say the feedback was not particularly useful for their work.
- **Better training** of RFC around funding for equity and different affiliate types. This could require bringing in specific expertise into the committees (ie around gendery equity).

# Review detailed report here

# Regional Funds Committees



# Participants Thank you for your time and thoughtfulness!

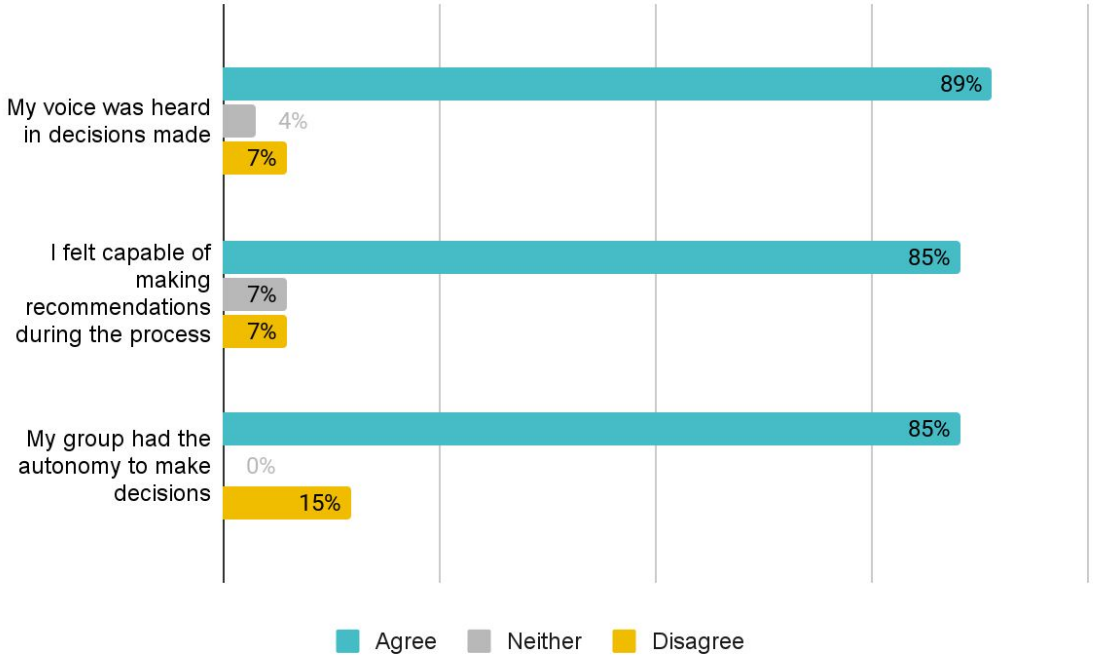
| | Total members (round 1 and 2 FY 2022/23) | Responses | % response rate |
|---|---|---|---|
| **ESEAP** | 11 | 4 | 36% |
| **South Asia** | 7 | 3 | 43% |
| **LAC** | 7 | 7 | 100% |
| **NWE** | 9 | 4 | 44% |
| **CEECA** | 8 | 2 | 25% |
| **USCA** | 6 | 2 | 33% |
| **MEA** | 7 | 5 | 71% |
| **Total** | 55 | 27 | 49% |

Survey on limesurvey

This data provides us with valuable feedback from half of the RFC members in Fiscal Year 22/23, and shines a light on processes as well as where pain points and opportunities might arise across regions.

As everyone needs to have the opportunity to give feedback to the RFC survey, we don't claim representativeness of all RFC members in this data (except in LAC, where 100% of members participated).

# A majority felt empowered in decision-making processes




At least **85%** of RFC respondents agreed they were heard, they felt capable, and their group had autonomy when making decisions.

- A couple RFC members from South Asia and NWE felt less empowered.
- In NWE, this seems to be because of confusion over the overall budget that affected funding decisions.
- The feeling of autonomy increased slightly in LAC and MEA from the previous year and stayed about the same in other regions.

# Whilst 74% felt that the Community Resources team communicated information in a clear and timely manner, there is room for improvement.

*"the lack of confirmation of elements of the budget (which the numbers add) or a more less standard review sheet prevent a global look of how the budget is being thought, and this allows a deconcentration of the committee to be able to be able to review" (LAC)*

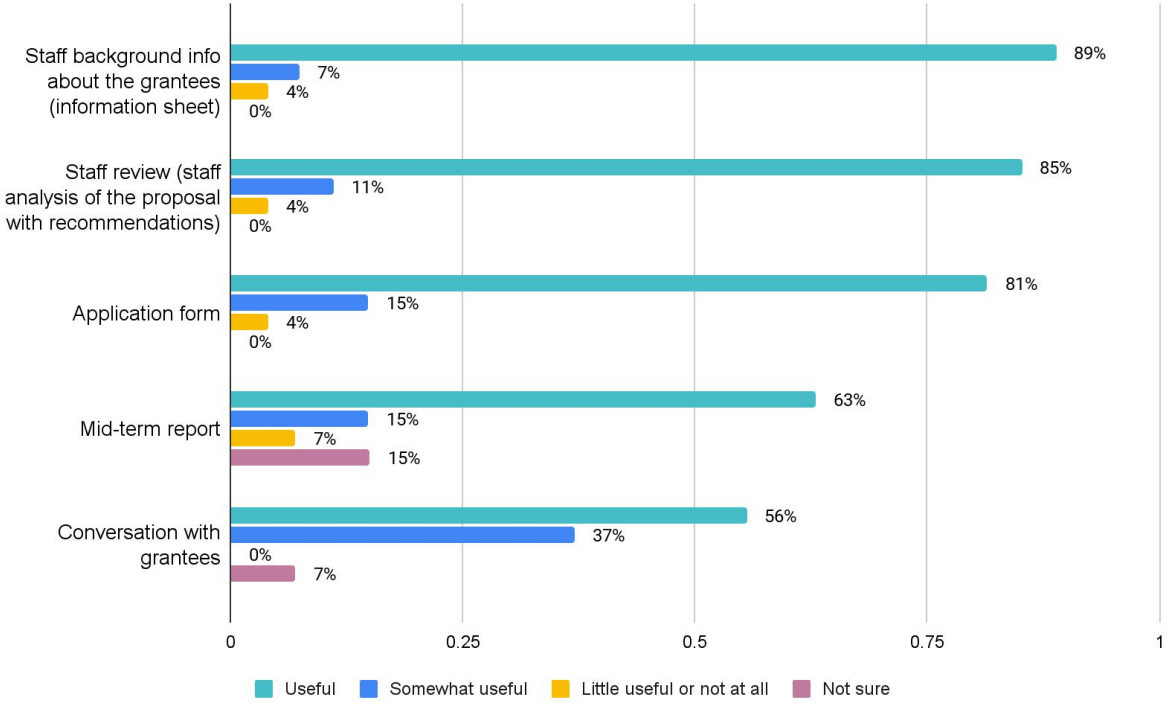
*" The Foundation has changed the opinion on the overall regional budget several times during the round, moving back and forth….our decisions were driven by values and were instead driven by faulty WMF communications" (NWE)*

*proactive overview of available budget for round, including already spent budgets from other rounds in multi-year grants (USCA)*

- 3 out 4 NWE respondents felt that this was not the case.
- Whilst other regions expressed clear communication, they also suggested improving clarity about the overall budget.
- Also, making sure the time to review is sufficient.

*At times the turnaround time (time between when we get an invitation to provide feedback & when the decision is due) is very tight; difficult to hear from everybody on the committee (USCA)*

# Respondents feel that staff review and recommendations are very useful for decision making. Conversations with grantees could be more useful, but they don't happen in all regions or for all applicants.




- Staff background and reviews were considered the most useful.
- Just over half, found conversations with grantees useful, however this does not happen systematically. RFC would like to see more of these earlier on in review process.
- **15%** were not sure about grantee reporting which indicates a need to make these more available in the review process.
- Whilst the application form is useful, there are still some suggestions to simplify.

# Things that seem to work well

- Staff preparing presentations in deliberation meetings with a background analysis of grantees (USCA)
- Using Asana and/or a single spreadsheet with all linked document in one place to manage task deadlines and easy access to documents (MEA/ESEAP)
- Conversations with grantees ("*they help personalize the process & enable us to make more nuanced decisions*")
- Analysis from staff with expertise in a certain topic
- Staff metrics analysis (ESEAP) and budget analysis

# Things that can be improved

- Conversations with grantees more in advance inviting all relevant RFC members.
- Streamline questions in individual review to give more time for group review.
- More time to review documentation. Sometimes sent with short deadlines ( common comment across regions).
- Link in past reporting and grants with a summary of the results.
- Consistency in the quality of staff reviews.
- More training on metrics review

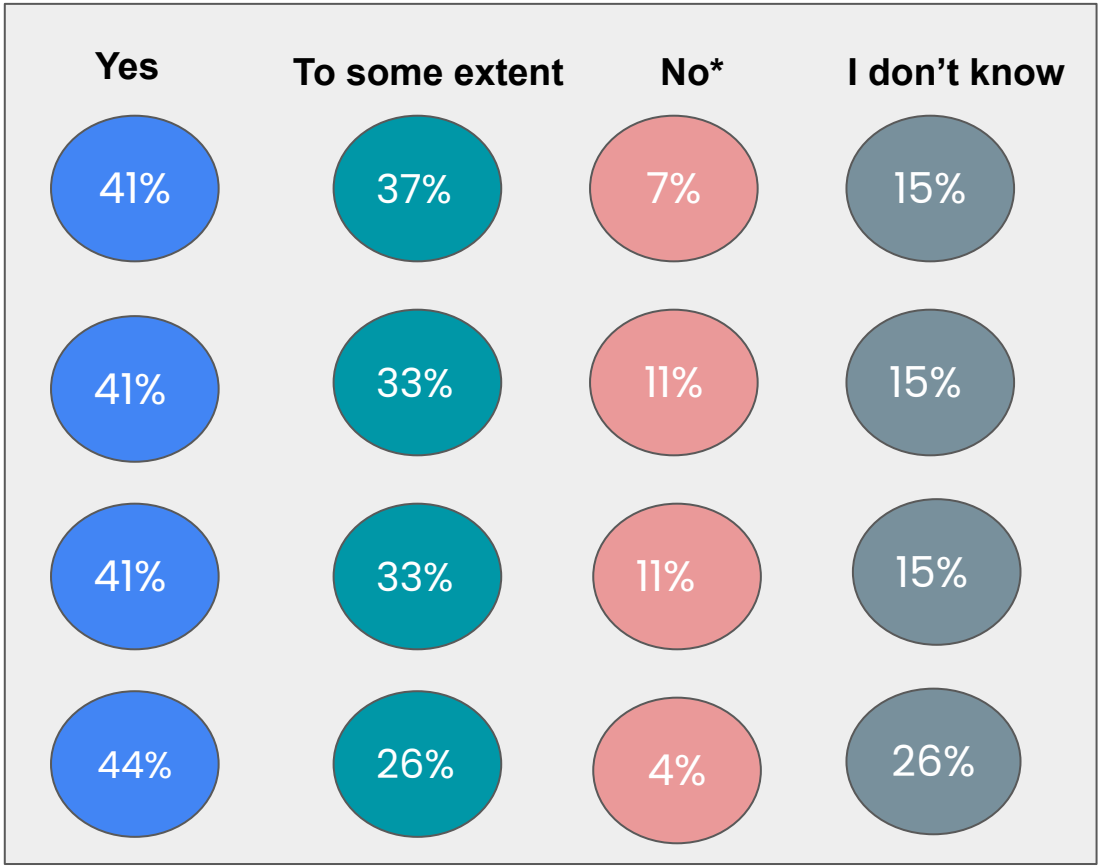
# Compared to previous rounds, more than 70% of RFC respondents feel that improvements have been made to some of the guidance to evaluate different areas

1. **Learning and evaluation (metrics)**

2. **Budget analysis**

3. **Analysis of organisational capacity and vision**

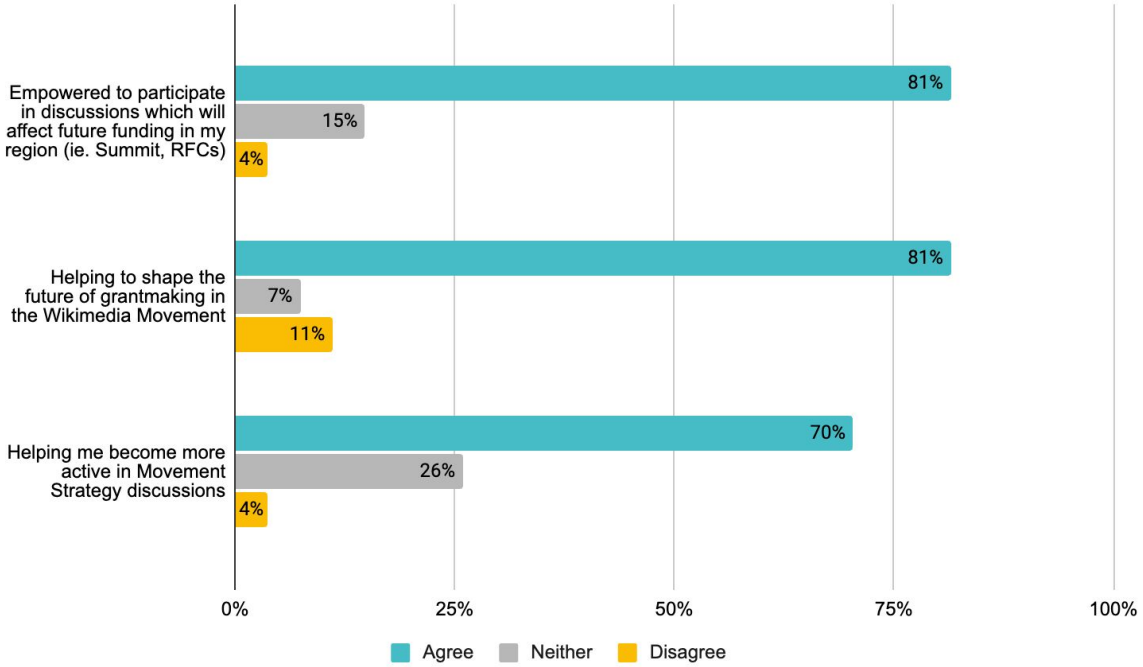
4. **Programmatic work**




*The 2 or 3 RFC members that believed it had not approved were the same for each category from USCA, LAC and NWE.

Many of those that replied that they don't know were newer members

# Movement engagement: 81% of RFC respondents believe that in their role is helping them shape future funding models, and their participation in Movement Strategy in general.




- Since **18%** feel neutral or disagree about shaping funding models it is worth better supporting their participation in spaces where this is being discussed. (Respondents were from SA, NWE, LAC, USCA and have been in the committees from the beginning).
- The **26%** that have a more neutral position of whether their role allows them to participation in MS discussions are a number of different regions.
- **70%** feel they are becoming more active in MS as a result of their role, showing an increase from last year (53%)

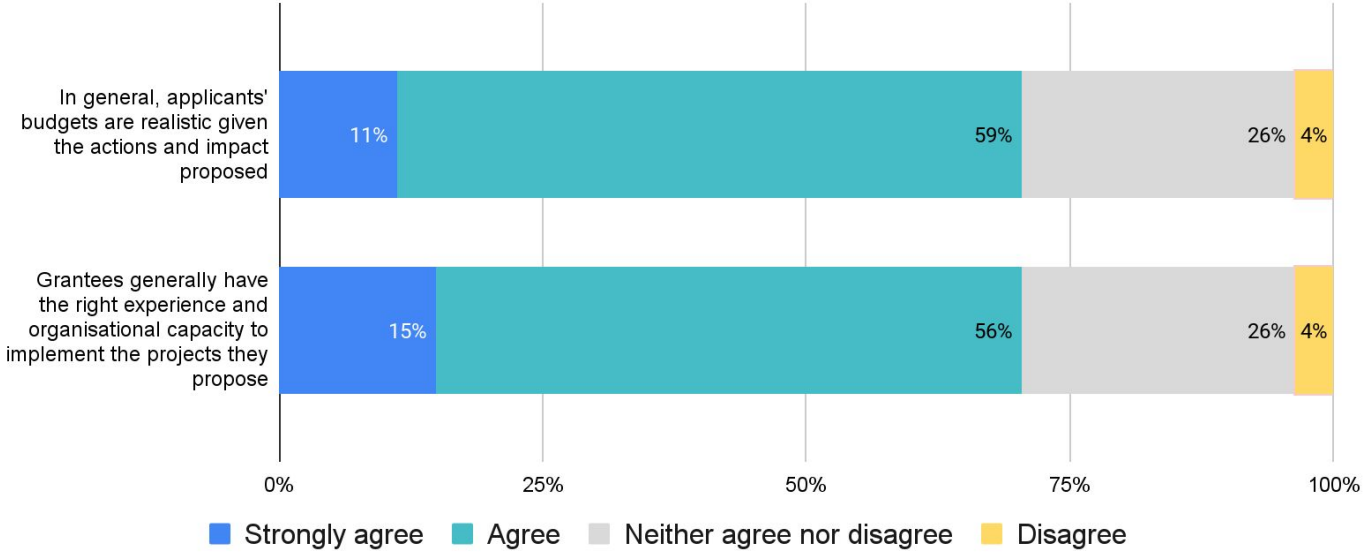
# Trust and partnership: RFC respondents believe they can voice critical views showing an increased level of trust and partnership with the CR team compared to previous rounds.

**85%**

Of RFC believe **their committee has space to voice critical views or disagreements** with the current grantmaking model

- However there are still a few RFC members from LAC, MEA South Asia felt they didn't have the space to express critical opinions. It is interesting to note that half of them were new members.
- It is necessary to continue to create these spaces for open discussion and empower RFC participation in movement spaces where they can voice these opinions.

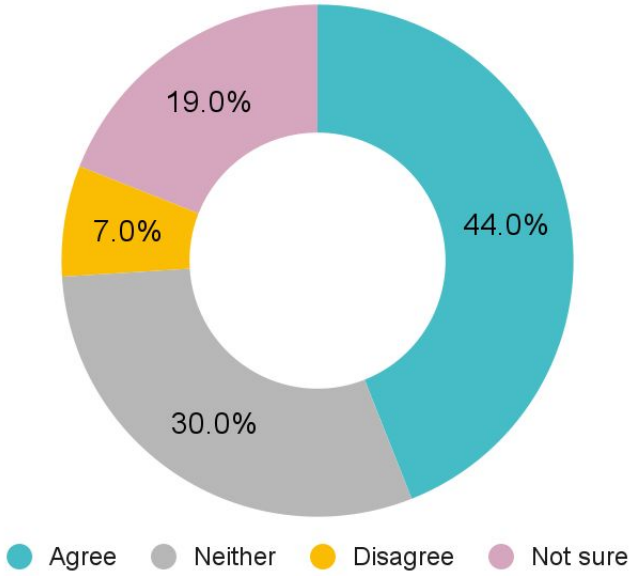
# Trust in applicants: Over 70% of RFC respondents generally feel that grantees' budgets are realistic and they have the right capacity to implement their work.




- The **30%** that have a more neutral position or disagree about grantees capacity and realistic budgets are RFC respondents from ESEAP, South Asia, LAC, MEA and NWE.

# Perception of grantees' trust in RFC: However, only 44% of RFC respondents think that grantees see them as well-informed to make funding decisions.

I feel grantees see committee members as well-informed to make funding decisions



- The feeling of being less "trusted" by grantees may be a result of the criticism received from grantees in some regions, such as LAC and MEA.
- Many are not sure or didn't agree or disagree because they felt they haven't interacted enough with grantees to know their perception (LAC, NWE, USCA).

**Engagement with grantees: RFC respondents' support for grantees varies across regions, the most engaged seem to be MEA, ESEAP and South Asia. The most common forms are providing proposal feedback before submission and participating in peer learning spaces.**

**56%** Of RFC respondents participated in peer learning spaces that involved grantees. More so in MEA, ESEAP and South Asia, and less so in NWE.

**41%** Invited them to discuss their proposal in a session. More so in USCA, MEA, South Asia and less so in ESEAP, CEECA and NWE.

**41%** Provided them with material to develop their proposal. More so in MEA, ESEAP and CEECA and less so in NWE and USCA.

**41%** Gave them feedback before submitting their proposal. More so in ESEAP, South Asia and MEA. Less so in all the other regions.

**Role satisfaction: The majority of respondents feel proud of their role, see it as a good way to contribute and feel they have built capacities. However it is important to look at the few who disagree with these statements (mostly in NWE, USCA and South Asia) to see why this is the case.**

**89%** Of respondents would recommend the Regional Funds Committee as a great place to contribute. However a few members (in NWE and USCA) would not.

**89%** Feel they have developed skills and capacities as a committee members. The few that disagree are in South Asia and USCA.

**85%** Take pride in their role. The few that disagreed were from NWE and South Asia.

**81%** Feel respected in their role. However some remained neutral on this point or disagreed (South Asia, NWE)

RFC respondents call for **continuous spaces for peer learning between committees**. This feedback had been provided in previous rounds. The Foundation could support organising these spaces, leaving committees to define their cadence and agenda.

# Applicants: General Support Fund

# Participants Thank you for your time and thoughtfulness!

| | Round 1 applicants | Round 2 applicants | Declined/withdrawn | Completed responses | % response rate |
|---|---|---|---|---|---|
| ESEAP | 4 | 5 | 1 | 4 | 40% |
| South Asia | 2 | 1 | | 1 | 33% |
| LAC | 7 | 5 | 2 | 10 | 71% |
| NWE | 11 | 5 | 1 | 13 | 76% |
| CEECA | 5 | 5 | 1 | 8 | 73% |
| USCA | 3 | 4 | 1 | 3 | 38% |
| MEA | 13 | 12 | 10 | 20 | 57% |
| Total | 45 | 37 | 16 | 59 | **60%** |

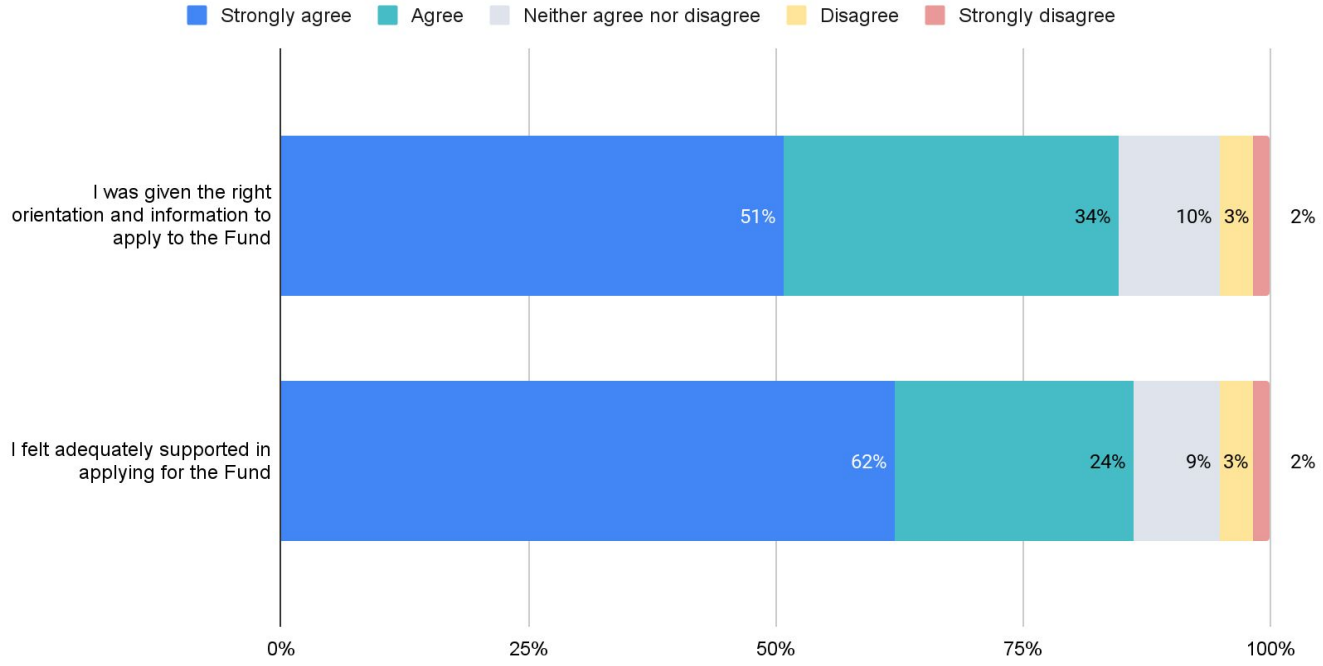
[Survey on limesurvey]

31% of respondents were new applicants

This data provides us with valuable feedback from 60% of applicants in Fiscal Year 22/23, and shines a light on processes as well as where pain points and opportunities might arise across regions.

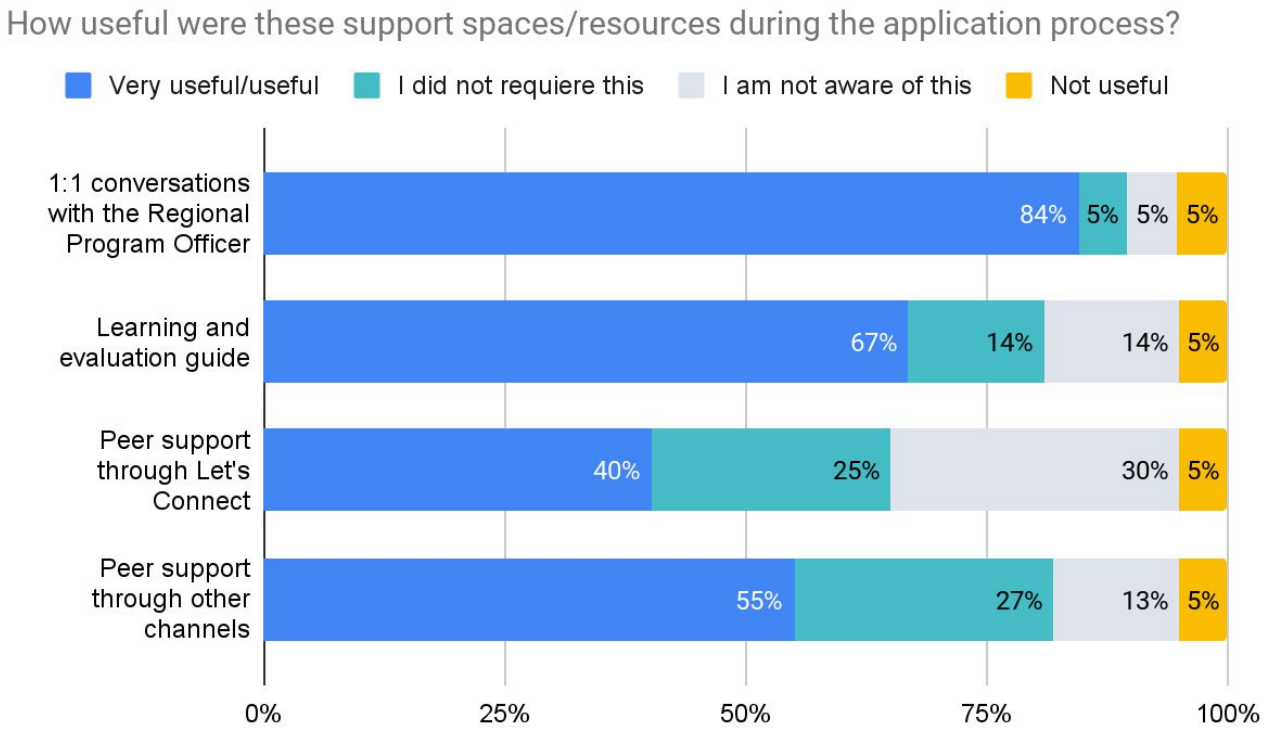
We don't claim representativeness of all applicants, but value each voice.

# 85% of applicant respondents agree they were given the right orientation and support to apply for the fund. This perception is the same among returning and new applicants.




- **76%** feel information was clear and timely, but there is room for improvement, as stated in qualitative responses
- **Disagree:** they were a couple of applicants from LAC and NWE that did not feel supported. Of these 1 fund was withdrawn and there had been continuous feedback on the proposal.
- **Neutral:** the 9% come from MEA, NWE, CEE.

# The most useful form of support continues to be 1:1 conversations with POs. The L&E guide has become more widely used in comparison to other rounds. There are opportunities to create more Let's Connect spaces around application support.




- The % that found 1:1 conversations and guides useful increased from last year.
- The minority of respondents (5% = 3 grantees) that feel resources weren't useful are mostly the same for each option.
- It is worth sharing guidelines and peer support options more actively as respondents (both new and returning grantees) in some regions are less aware of them (NWE, MEA, ESEAP).

## Things that seem to work well in terms of support

- Meetings with Committee members early on in the round (several regions)
- Reviewing other applications as examples (particularly those of similar organisational size and with metrics examples) (LAC)
- Conversation hours (LAC)
- Conversations that focus on specific organisational support where needed (ie. leadership /financial management issues (MEA)
- Regional learning reports for an overview of what is happening in the region (LAC)

## Things that can be improved

- More clarity and anticipated communication about the process and its dates and requirements (several regions)
- Clearer budget template and recommendations. More guidelines on budget limits (particularly for first time applicants), costs around fiscal sponsorship and staffing (several regions)
- Conversations with 1:1 well before the application deadline (not consistent for all applicants) (LAC/MEA)
- Better support in the definition of metrics in specific proposals (MEA)
- More practical examples in guidelines. (MEA)
- More contextualised orientation and support for smaller groups and newer applicants (several regions)
- More alignment with grant application times and annual processes. Ie September is hard to align with participatory processes within affiliates.

# In their voice: some perceptions about things that particular grantees found valuable

*I learned a lot from the regional report, which put my experience in a context that I did not have before, and helped me better understand the role of the affiliate and the impact to be taken into account. (LAC)*

*It was very useful for our context to meet the committee, as it allowed us to expose our writing methodology. One form is always a result, so it hides the work process. (LAC)*

*Information provided on Meta are all useful. There are pdf links to be reviewed for each section. Thank you for making the application readable and writable in multiple languages. However, we still have to use English for many inquiries.(ESEAP)*

# In their voice: some perceptions about things that particular grantees found needs improving.

*The biggest flaw during the process is missing communication with the Committee members.Only communication with them is final comments in our grant proposals with a lot of assumptions. (CEECA)*

*The orientation is designed for Chapters or groups with a formal structure (staff) and does not take into account the situation of those of us who ask for help without having a team. (NWE)*

*“we were severely caught off guard when the due date for grant applications was unexpectedly pushed forward by at least a month. This meant that we were unable to do the community consultation process for drafting our grant application and 3 year application. This effectively has, on a strategic level, pushed our chapter back by a year. Something that would be helpful for preventing this would be clear and consistent grant application dates around which we can plan. (MEA)*

**A majority of respondents felt that the metrics they defined were useful and they had autonomy to define them. But, there is a call for more guidance and support in data collection. Grantee reporting shows that this is the area the where grantees feel they most need to build capacities.**

**88%**

- Felt they had the autonomy to develop their metrics.
- Those neutral or unsure (7%) were from MEA, LAC and NWE.

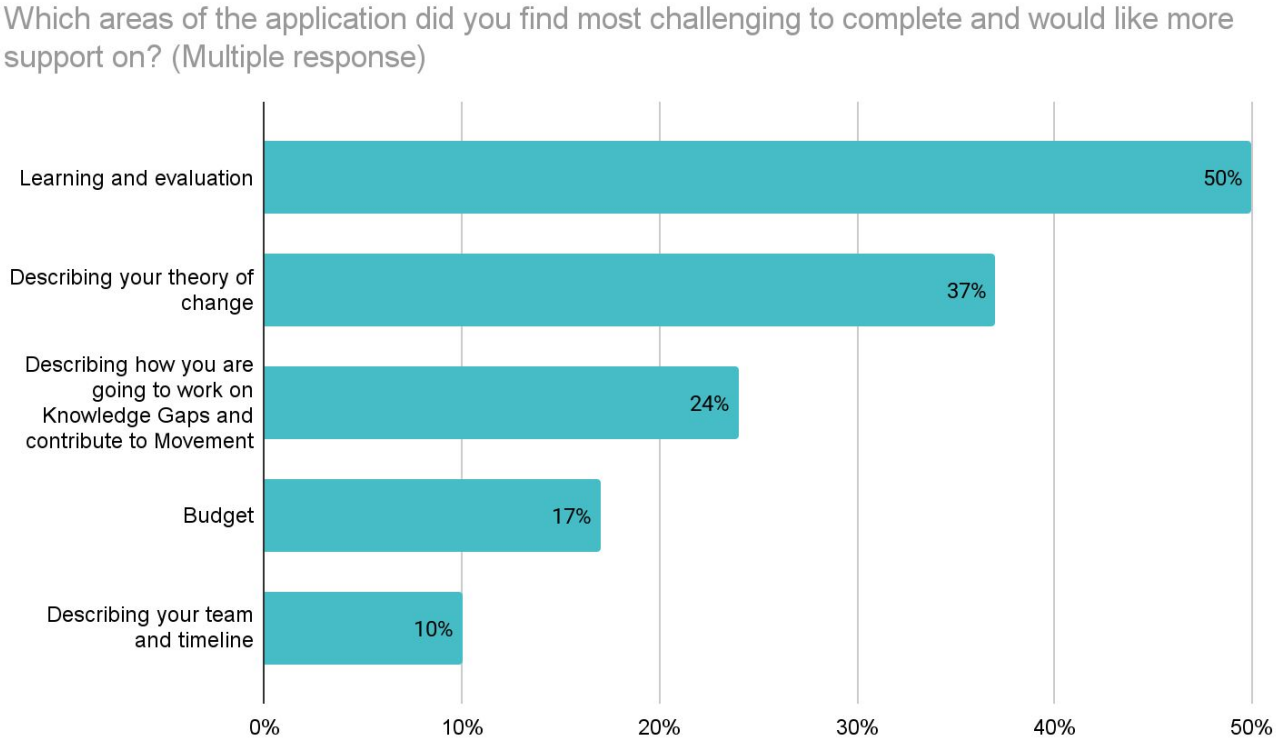
**77%**

- Of applicant respondents agreed that the metrics they developed were **valuable to them** and helped them learn from my work
- The 3 respondents (5%) that disagreed were from NWE, LAC and MEA
- Those neutral or unsure (10%) were specific grantees from NWE, LAC, USCA, CEE, MEA, both new and returning grantees of different sizes.

**69%**

- Felt they had the right guidelines and support.
- The 11% that disagreed were from NWE and LAC (both returning and new grantees)

# In line with the previous insights, L&E is the most challenging part of the application. More support is also needed to develop Theories of Change and defining Knowledge Gap contributions.



**37% of respondents stated that they did not include something because they felt it was risky /ambitious or would not be approved. There is a call to review some of these needs early in application support process.**

## Some of the common things that were not included

- **Staffing:** particularly community managers, partnership outreach, communications, and for participation in Movement strategy discussions (many regions)
- **Incentives for volunteers** in terms of financial support or in-kind recognition, particularly for tasks that require a lot of work (data cleaning/uploading), professional translators for specialised content or underrepresented groups (many regions)
- Equipment (cameras, computers) (MEA)
- Staff raise to meet inflation or tax changes (many regions)
- Funds to attend conferences (NWE)

## Some more unique things

- Funding more long term strategic /innovative initiatives. Some grantees ended by seeking MSIG grants for this.
- Proposing activities beyond an institutional or geographical scope (LAC)
- Things that are not seen to have a direct impact on Wikimedia projects, such as creating a learning center with resources for editing and non-editing volunteers (ESEAP)
- Funding to develop a strategic plan and internal procedures (MEA)
- Innovative models to support underrepresented volunteers - such as a time bank (NWE)

**Trust in Community Resources: A majority of respondents feel that they can reach out to POs with sensitive or challenging issues. They also feel they can express critical voices, but there is room for greater trust-building.**

**75%**

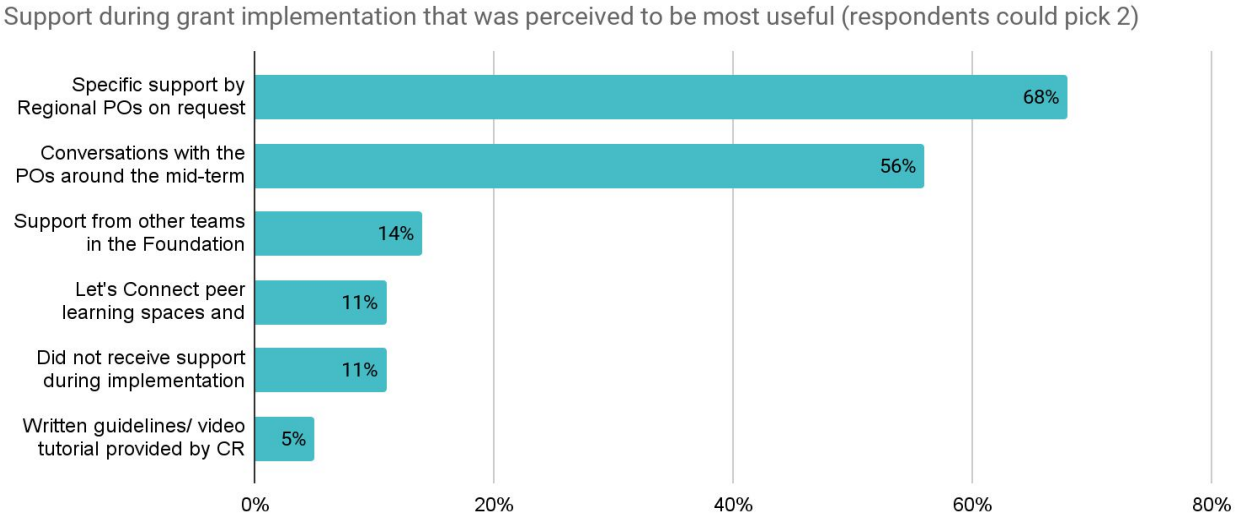
- Feel that can reach out to POs with sensitive issues.
- **22%** are still neutral or unsure about this and come mostly from NWE but also a few from MEA, LAC, SA. The 3 grantees(4%) that disagree and they had some issues with their funding approval.

**62%**

- Feel they can express critical voices.
- 24% are still neutral or unsure about this and come from all regions.
- **15%** that disagree are from MEA, NWE, CEE and LAC and are diverse in terms of grant history and size.

Even if it is a minority, it is important to work with these grantees to understand why they have this perception and find ways of building more trust and support.

# Support beyond funding: A majority of respondents feel that the CR team is providing support beyond funding particularly through PO conversations. However there is room for more continuous capacity building services, beyond the CR team.



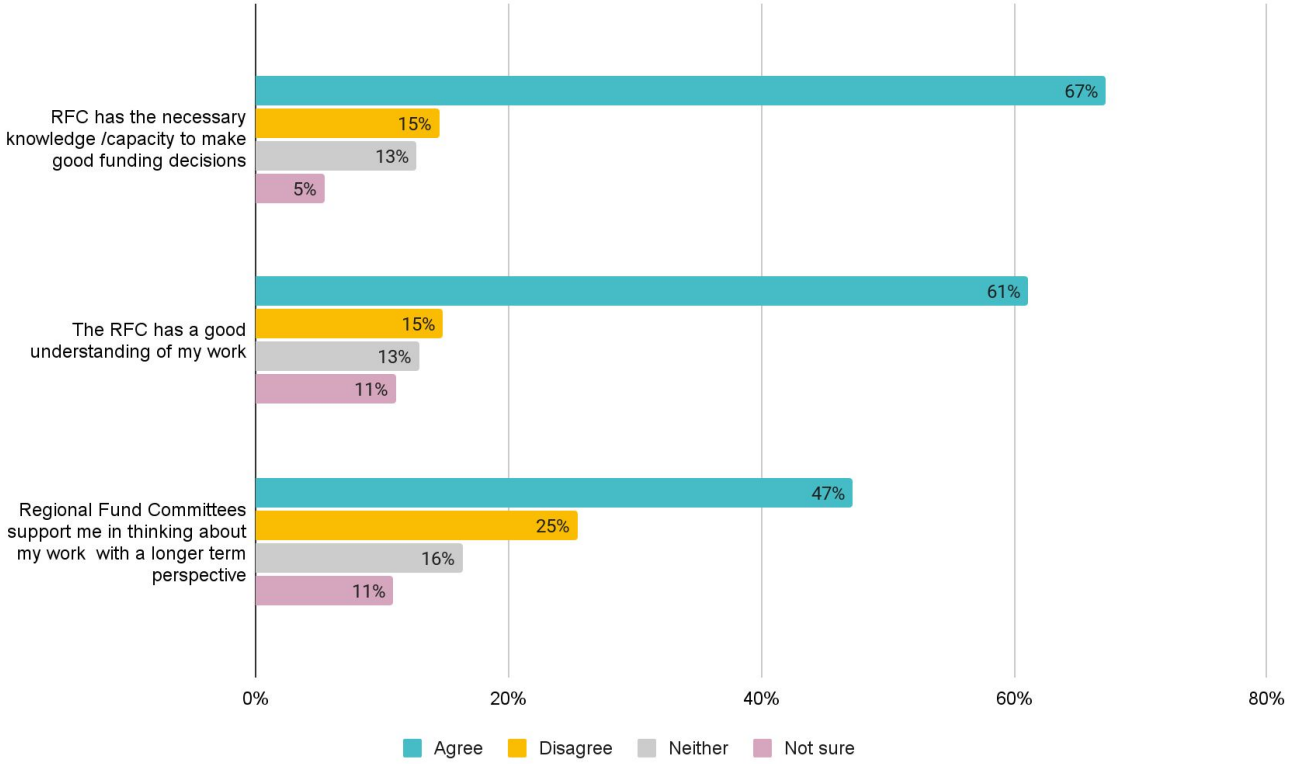

- **PO conversations** have been the most useful forms of support during implementation.
- Whilst **Let's Connect** clinics have been around topics related to programmatic/org. work, these may need to target more grantees.
- It would be interesting to discuss what type of **written/video guidelines** may be more useful or accessible.

# Support beyond funding: A majority of respondents feel that the CR team is providing spaces to support collective learning about grantee work in the region.

**67%**

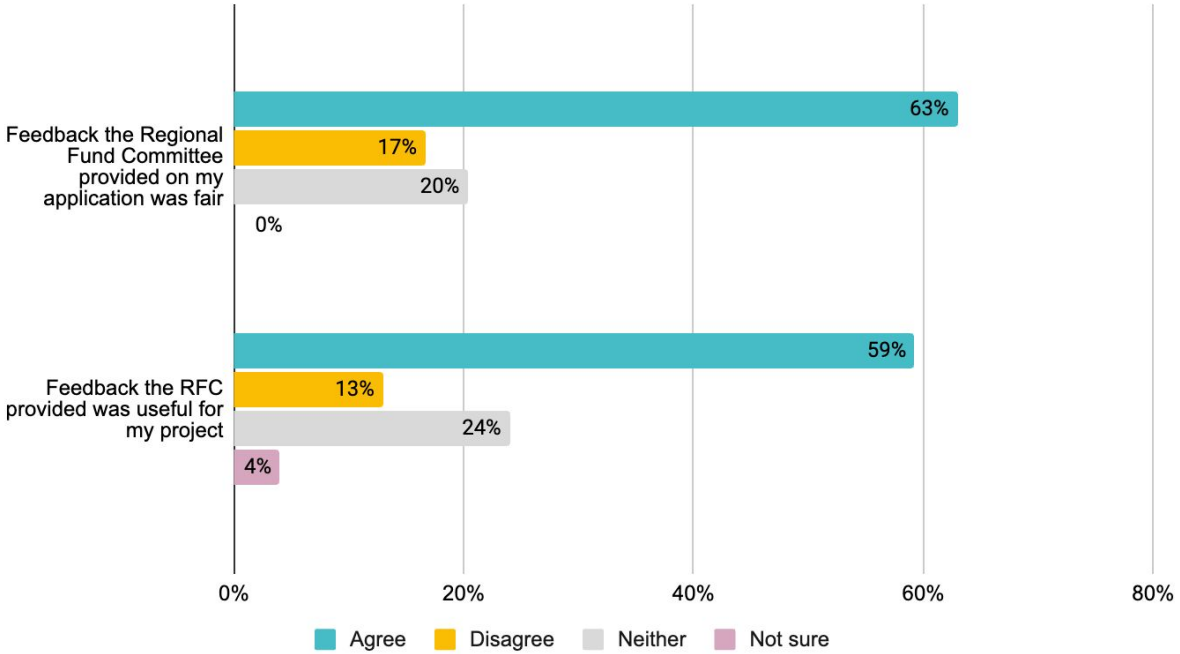
Feel the CR team is facilitating wider discussions about grantee work in the region (through Let's Connect and Regional Learning Session). However 15% are still unaware or unsure, which indicates the need for better communication or adjusting these learning spaces.

# Trust in RFC: Respondents increasingly feel that RFC have the capacity to make good funding decisions and understand their work. However, there could be improvements on how RFC offer partnership for <u>longer term thinking</u> about grantees' work.




- In comparison to last year, the perception regarding **RFC capacities** has grown in most regions. The grantees that disagree are from LAC (2), USCA (1), CEE (2) and NWE (3), mostly returning grantees of different sizes.
- Those that are neutral or not sure if RFC have the capacities to make good funding decision (10) are from the same regions, but also include a few from MEA and ESEAP.
- Respondents that disagree that the **RFC are supporting longer term perspectives** (14) are from the same regions, many returning grantees, and half are larger affiliates (7).

# Feedback from RFC: Respondents increasingly feel that RFC feedback is fair and useful, however for a number of grantees (many returning + larger and small affiliates) this is not the case. This requires looking at specific cases and seeing how RFC can be more supportive.




- Grantees that felt it was **not fair** were from USCA (2), CEE (2), NWE (3), MEA (1) and LAC (1). Some of them coincide with those that feel that RFC don't have the capacities to make funding decisions.
- Those that **disagree that it was useful** are from LAC (1), CEE (2) and NWE (3) and also coincide with those that think RFC don't support longer term thinking.
- Those that are **more neutral or unsure** come from different regions and are grantees with different characteristics.

**Feedback from RFC: Despite recognising improvements, grantees are repeating a lot of the suggestions they had made in previous rounds of funding to improve RFC feedback. It is worth working with RFCs and returning grantees to review the specific ways this can be improved in each case.**

**44%**

Of respondents believe that RFC did not highlight anything that helped them significantly improve your proposal or think about future work.

These were applicants from various regions (*many from NWE, MEA, CEE and LAC)*. 70% were returning applicants and of various affiliate sizes.

# How could feedback improve? (many of these repeat what was said in previous rounds)

**Meetings with Committee** members to discuss feedback and questions (many regions)

**More support outside of rounds** in a "peer culture". Invest more in a "*sustainable relationship between the different parts*" (many regions).

Include RFC members **with experience leading affiliate** projects. "*Someone who knows how to manage, to help grow*". (many regions)

Ask **common questions in the application** form, so that answering RFC questions does not feel like "*writing a new proposal*". (MEA)

To improve quality committee members may **need more time and paid recognition** for their work (ESEAP/NWE)

Meeting 2 times a year to discuss reports and future plans (MEA)

**More consistency in the criteria** and depth of feedback so grantees know what to expect and it is not "*a box of surprises*") (LAC)

Be clear on what is possible. **Don't make promises** around future funding options if these aren't guaranteed. (CEE)

**Actually give feedback** and not only final comments and not just repeat comments from previous rounds without acknowledging changes. (CEE)

Think of a way to assign certain RFC members specific proposals so they can offer more continuous support and deeper feedback over time. (LAC)

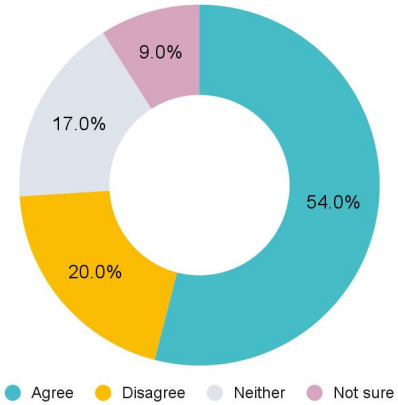
RFC need expertise to **review applications differently** (different context, realities) and should have knowledge or parameters for understanding things like salary scales and invests needed for promoting equity (NWE)

RFC need better expertise about strategies to promote **gender equity** and value these (NWE)

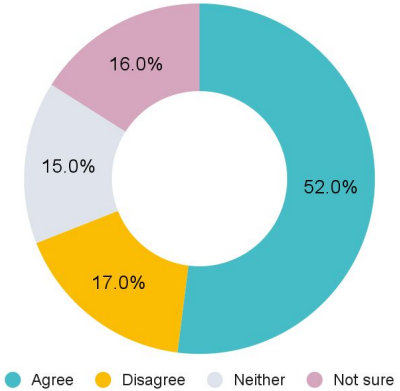
**Trust in RFC: Just over half of applicants see the RFC is using their knowledge to distribute resources fairly to them and within their region, in comparison to a global committee or the WMF. However, there is still work to be done so there is great trust in the model in almost half that currently disagree or are unsure.**

- Grantees that don't agree are from CEE (3), USCA (1) NWE (4), MEA (1) and LAC (2) and coincide with those that feel that RFC don't have the capacities to make funding decisions. Those that are **more neutral or unsure** come from different regions and are grantees with different characteristics.

Compared to funding decisions being determined by a global committee or the Wikimedia Foundation, I believe the Regional Fund Committee reduce bias in distributing resources fairly to my group/organisation




I believe the Regional Fund Committee uses knowledge about the region and its communities to reduce bias in distributing resources fairly in my region



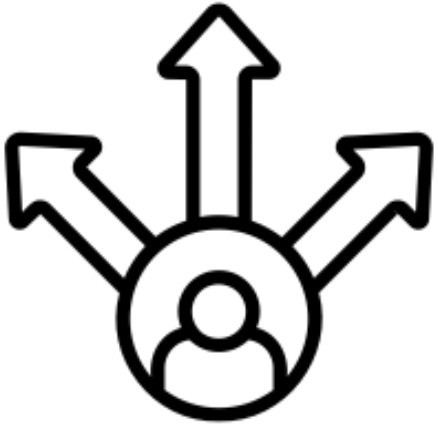
**Reviewing all the survey responses, this general lack of trust in model relates to the perception that RFCs:**

- Lack the **right capacities** to make funding decisions for different types of grantees (for instance larger and smaller grantees without structured teams)

- Volunteer committees don't have **time and/ or capacity** to be thought partners outside of approval rounds - ie. discussing reports, putting together regional analysis, etc. And it can be too much to ask of volunteers.

- That the model requires **instances beyond the "region"** may be needed - like thematic reviewers or with specific expertise (ie. related to gender equity).

- There are questions about the **criteria WMF uses to distribute funds** to each region and whether there are equity considerations or bias.



# In their voice: some perceptions about things that particular grantees felt about the model.

*We need a thematic committee, because regional committees don't properly address international, thematic work. (USCA)*

*Looking only at projects, a transverse and global space was sacrificed in his analysis, which arouses the risk of isolating experiences and initiatives, documentation and sharing of acquired skills. (LAC)*

*"Foundation needs to find a way how to include more in the conversions between our Regional Officers and grantees. They cannot making a decision only based on the grant proposals and not following our work during the grant implementation.(CEECA)*

*"It is not very clear to me, as a grant, how resources are distributed before arriving at the committee. What are the criteria applied to the lac region to receive their annual value?" (LAC) / There may be bias at a higher level in the process (when funds are distributed over the regions) which cannot be addressed by the committee (NWE)*

*"I cannot responsibly judge the work of the commission from a few lines of feedback.I am concerned that asking volunteers to do such a large amount of work is unsustainable and even irresponsible. (CEECA)*

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