

Operations Tuning Session Q1 FY20-21



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Efficacy & Resilience OKRs



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Operations



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Centralized Ticketing System



Objective:

Implementation of a centralized ticketing system to drive standardized workflows for issue resolution, reduced response times, improved communication and automatic routing to ensure correct teams are engaged

To improve equity of service offered to staff, a centralized ticketing system will be expanded to Legal, T&S, T&C and Security to drive standardized workflows for issue resolution, reduced response times, improved communication and automatic routing to ensure correct teams are engaged.

Our Q1 efforts were focused on ticketing system evaluation and subsequent contract negotiations. Currently there are three ticketing systems in our environment: Zendesk (Adv + ITS), Hiver (Comms), and Salesforce (Legal + T&S). Of all three, Zendesk is utilized for the bulk of Foundation ticket management and has well-established 'in-house' user support.

Once Zendesk was identified as the preferred system of choice, contract negotiations commenced and all existing Foundation service orders were collapsed into a single master service agreement; additionally, license costs were reduced as a result of vendor comparisons and increased license volume.

Our next step is to complete detailed workflow mapping and system configurations.

Target quarter for completion: Q3 FY20-21

Centralized Ticketing System



Key Results

	Year Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
Identify a platform to support customer service requests (Q1) Baseline: No single platform identified	Platform identified	Platform identified	-	-	-
Document standard operating procedures and service level agreements (Q2) Baseline: No SOPs or SLAs defined	SOPs and SLAs defined	SOP/SLA documentation underway	-	-	-
Train all staff on how to request assistance (Q3) Baseline: 0% of staff trained	85% of staff trained by year end	-	-	-	-



Sustainability



Objective:

Advance towards carbon neutrality

A host of activities were completed during the first quarter for Sustainability:

We published our carbon footprint and impact statement that covered calendar year 2019, 2.43 tCO₂-eq impact equivalent to 280 homes' energy use for one year. Additionally we hosted an editathon on climate justice which frames global warming as an ethical and political issue, rather than one that is purely environmental or physical in nature.

Our first quarterly Community roundtable discussion was focused on carbon offsets of both our vendors (data centers, caching centers, etc) and our operations (Foundation offsets). We also investigated endowment and 401k investments for sustainability prioritization and accessibility.

Target quarter for completion: Ongoing

Sustainability



Key Results

	Year Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
Deliver strategic programming to reduce our carbon output by 1% (Q1-Q4) Baseline: 2,430.69 tCO2-eq	1% footprint reduction	Partnership exploration underway	-	-	-
Identify mission-aligned offsets to advance carbon removal Baseline: No offsets identified	Offset program activated	Offset potential identified, pending scenario	-	-	-



Global Data & Insights



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Movement Data & Insights



Objective:

Collect, analyze, and share data on the demographics, needs, and experiences of movement participants to inform ongoing decision making and determine whether we are meeting Foundation goals related to a thriving movement and so that ultimately, we can create a more equitable movement.

We continually work to improve the quality of the movement data we collect, the clarity and narrative power of our reporting, and the use of this data to support and inform the Foundation's work towards a Thriving Movement.

Affiliates Data Survey: In Q1, we completed and published internally the Affiliates Data Survey report, which shared emerging trends and needs from Wikimedia affiliates. We are now working to socialise these data with foundation teams.

Community Insights Survey: In Q1, we revised the Community Insights survey to reduce its length by 20%, added a question collecting race/ethnicity from Wikimedians in the US and Britain, and expanded survey translation to 20 total languages. Data collection for 2020 began in September.

Target quarter for completion: Q4 FY20-21



Movement Data & Insights



Objective:

Collect, analyze, and share data on the demographics, needs, and experiences of movement participants to inform ongoing decision making and determine whether we are meeting Foundation goals related to a thriving movement and so that ultimately, we can create a more equitable movement.

Equity Index Project: Advanced on analysis framework for Wikimedia Presence and Growth metrics build. Project and team leads from across 13 teams were identified in our use case mapping as data partners (5) and/or high potential use cases (11) 36 project and team leads from these teams were onboarded to the [project overview, timeline, and dashboard mockup](#) in Q1. The team is currently integrating suggestions from these initial onboard consultations and will soon be sharing those revisions and next steps for a targeted feedback round in Q2 as we work to build the alpha dashboard.

Affiliate Data Portal: We completed design and implementation of Affiliates indicators upload form based on the affiliates health indicators framework, and are now piloting data mining from submitted annual activities reports. We have also started automating affiliates reporting status system as part of the affiliates data portal.

Target quarter for completion: Q4 FY20-21



Movement Data & Insights



Key Results

Q1: Refine CI survey and launch, analyze affiliate user contributions and socialize data to AffCom, build equity landscape data with grants metrics and language-based analysis

Q2: Close CI survey and clean data; revise affiliate survey design and complete AffCom socialization; develop equity language mock-up

Q3: CI data analyzed and presented for annual planning; 2021 affiliate survey launched; equity database updated with user data

Q4: 2021 CI survey revised; affiliate data analyzed; CI data added to equity database and public equity landscape shared

Baseline: 0% complete

Provide one data report per quarter about the Wikimedia Movement to Foundation staff

Baseline: No reports released

Q1: Upgrade affiliate data portal and create evaluation rubric

Q2: Automate affiliate reporting

Q3-4: Develop advanced query form and scale feedback system

Baseline: 0% complete

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
	100%	36%	-	-	-
	4 reports	1 report	-	-	-
	100%	21%	-	-	-



Department: Operations

Foundation Data & Insights



Objective:

Improve the effectiveness and equity of Foundation-led programs and events by collecting, collating, and reporting on data that helps us evaluate program inputs, outputs, and outcomes so that leaders have insights to shape planning and funding decisions.

We are building and implementing systems for measuring the social impact of the Foundation's work.

Foundation Support Score (NPS): Added a new OKR to report on community sentiment to the C-team in early Q3.

Events and Community Leadership Evaluation: Built a toolkit for community-led event evaluation, as well as a revised evaluation framework to better measure success of the Event Refresh.

Grants Evaluation: Evaluated and reported out on **GLOW Year One: Indonesia & India.**

Target quarter for completion: Q4 FY 20/21



Foundation Data & Insights



Objective:

Improve the effectiveness and equity of Foundation-led programs and events by collecting, collating, and reporting on data that helps us evaluate program inputs, outputs, and outcomes so that leaders have insights to shape planning and funding decisions.

We are building and planning systems to make data at the Foundation easier to use.

Culture of Data: Hired a new Director of Global Data & Insights to start in late October who will lead the design and facilitation of an analyst Community of Practice to improve cohesion among Foundation data teams.

Dashboards: While delayed on one milestone of deciding on dashboard platform due to the lag in our Director hiring, the team has moved forward in leading data-driven workshops to engage key internal stakeholders with use of the interactive supplemental reporting on [Collaboration, Diversity & Inclusion](#) measures captured by the [Community Insights](#) survey as well as advanced on the [dashboard mock-up](#) for Wikimedia Presence and Growth metrics.

Target quarter for completion: Q4 FY 20/21



Foundation Data & Insights



Key Results

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
<p>Q2: Finalize Foundation NPS-proxy measure Q3: Report out on NPS to C-team</p> <p>Baseline: 0% complete</p>	100%	0%	-	-	-
<p>Q1: Lead workshops to socialize available data, choose dashboard platform Q2: Amplify available data to decision-makers Q3: Lead workshops to socialize dashboards, launch public geo-index Q4: Share public equity dashboard, launch affiliates and language dashboards</p> <p>Baseline: 0% complete</p>	100%	17% (8% delay)	-	-	-
<p>Q1: Form a Community of Practice for Foundation analysts Q2: Select and launch an improvement project for the CoP Q3: Implementation of CoP improvement project Q4: Wrap-up improvement project</p> <p>Baseline: 0% complete</p>	100%	0% (25% delay)	-	-	-
<p>Q1: Build events evaluation toolkit; evaluate GLOW; final report for Wikimania 2019 Q2: Finalize events toolkit, clean and report on historical grant metrics Q3: Implement new evaluation framework on any major in-person event, assess and improve grants data processes Q4: Automate key grants pipeline data processes</p> <p>Baseline: 0% complete</p>	100%	18% (4% delay)	-	-	-

Department Update



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Events Refresh



Goal

Perform a deep-dive analysis to surface opportunities for improvement and bring clarity to inherited processes and strategic direction within the Events space



Upcoming Q2 projects

- **Community engagement plan:** Increased inclusivity of community voices across all Events efforts
- **Events portal:** Improved access to resources for event organizers and participants
- **Ecosystem design:** Sustainable continuity of valuable exchanges through the connectedness of our events
- **Staff travel process:** Equitable opportunities and improved processes and gatekeeping for staff as it relates to event participation

Foundation Data: NPS

GD&I has been tasked with developing a **Net Promoter Score for the Foundation.**

What we currently measure:

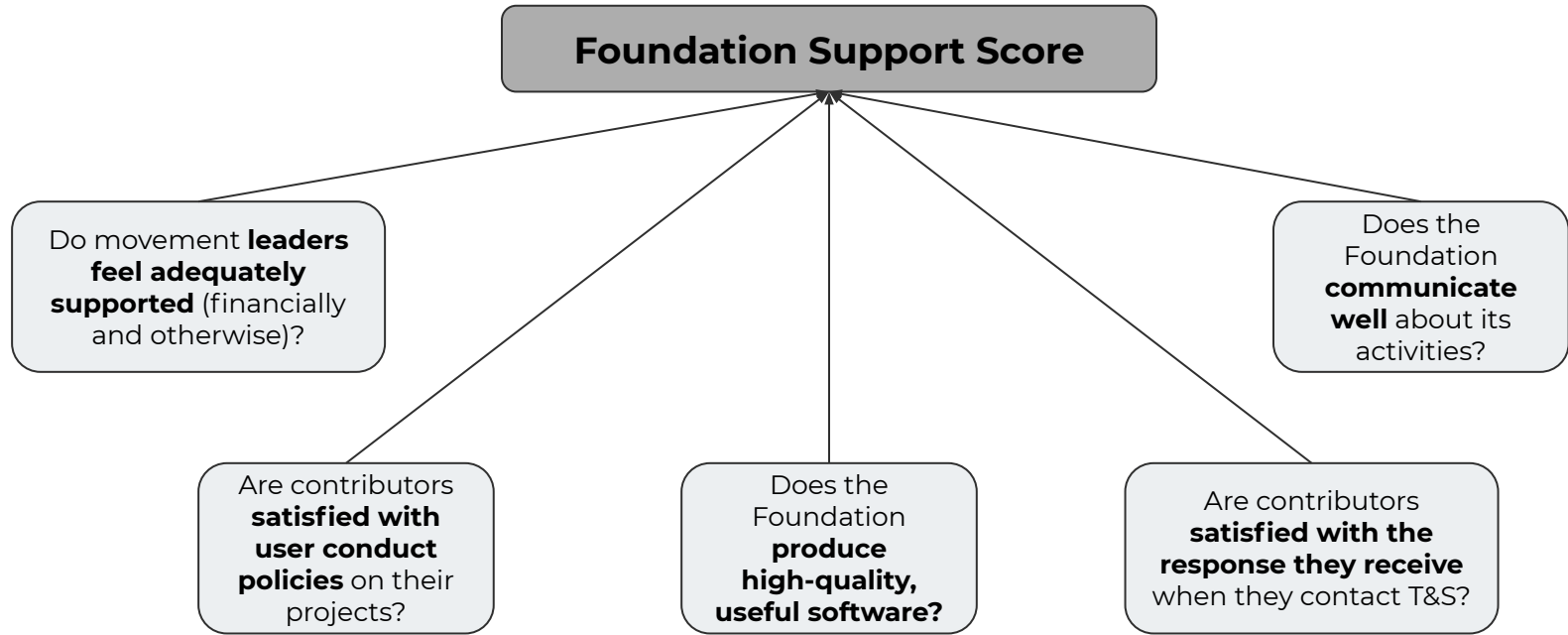


What assumptions are at play?

- The Foundation needs a "report card" from the community that we can track over time
- The measure should be **relevant to most Wikimedians** who don't interact with the Foundation directly
- The measure should be about communities' **general satisfaction with the Foundation**, so that more specific indicators about satisfaction with our services and actions can "roll up" into it



Foundation Data: NPS



Welcome new team members!



Irene Florez

Data Analyst/Architect
Global Data and Insights



Sumeet Bodington

Director
Global Data and Insights

Questions



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Appendix



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Acronyms

CI (Community Insights)

tCO2-eq (total carbon dioxide equivalent): a metric measure used to compare the emissions from various greenhouse gases on the basis of their global-warming potential

SLA (Service Level Agreement): timelines, quality levels, and responsibilities that are agreed to between departments

SOP (Standard Operating Procedure): step-by-step instructions used to help create department configurations

WAD (Wikimedia affiliates data): Referring to the Wikimedia affiliates' data portal

