



# Quarterly Review

## Community Engagement

Q4 - 2014/15



# Quarterly Review

## *Learning & Evaluation*

Q4 - 2014/15

Approximate team size during this quarter: 7.2 FTE

# Q4 - L & E

# Quarterly Objectives Summary

Objective	Measures of success [ <i>Team members</i> ]	Status
<p>1. Promote effective program design and resourcing:</p> <p><a href="#">Programs Reports</a></p>	<p><b>Increase knowledge about Wikimedia programs, their design, and impact</b> through</p> <p>(1) Development and publication<sup>1</sup> of 4 of the remaining <a href="#">Programs Evaluation reports</a> [2-6]</p> <p>(2) To be followed with announcements, RFC, and socialization (see <a href="#">timeline</a> for rollout) [2-5]</p>	<p><b>MET TARGET</b></p> <p>All targeted reports are in final draft and within various stages of their soft release<sup>2</sup> within internal or community review (see <a href="#">timeline</a>)</p>
<p>2. Promote effective program design:</p> <p><a href="#">Program Toolkits</a></p>	<p>(1) Conduct 7-8 program leader interviews for each programs toolkit for contests: (a) Writing contests (Target: Completion) and (b) Photo events (Target: Initiation only) [2-4]</p> <p>(2) Launch <a href="#">writing contest toolkit</a> with at least 5 new learning patterns each and initiate calls to action to engage community [3-5]</p>	<p><b>MET TARGET</b></p> <p>Toolkit soft-release with 16 new learning patterns shared to program leaders 6/26/2015. Full launch set for 7/5/2015. Interview contacts for photo events initiated.</p>

<sup>1</sup>“Publication” involves initial soft-release on meta followed by blog announcement and larger community RFC and input to final sign off of publication and release of peer review template. Each of the reports will be in various stages of publication as noted in the timeline.” [On-wiki Writing Contests](#), [Edit-a-thons](#), [Editing Workshops](#), all in soft-release stages while, as noted in the original Q4 objective, the [GLAM Content Release Partnerships](#) soft-release is on hold for the drafted report for pairing and roll-out with Wikimedians in Residence report in Q1.

<sup>2</sup> Based on first reports we had to revisit design, with feedback from across Community Engagement, and a revised communications plan early in the quarter we slowed roll-out of the reports to allow each report a more clear community review and input time and process.

# Q4 - L & E

## Quarterly Objectives Summary

Objective	Measures of success [ <i>Team members</i> ]	Status
<p><b>3. Evaluation Capacity development</b></p> <p>Program Leader Facilitation, Training, and Support</p>	<p>(1) GLAM-Wiki Conference Learning Circles</p> <ul style="list-style-type: none"> <li>- At least 10 community members initiate involvement<sup>3</sup> [2]</li> </ul> <p>(2) WMCON Pre-Conference</p> <ul style="list-style-type: none"> <li>- At least 30 program leaders, 80% or more indicate progress pre to post (5)</li> </ul>	<p><b>SURPASSED TARGET</b></p> <p>51 Unique participants across the different conference events. 87% of pre-conference participants indicated progress in their understanding of key terms and concepts. (Read the <a href="#">blog</a> for more!)</p>
<p><b>4: Internal WMF support</b></p>	<p>(1) On-going internal support: Emerging communities research completed with 16 communities/countries [1]</p> <p>(2) Evaluation of Round 2 APG grantee impact [2]</p>	<p><b>MET TARGET</b></p> <p><a href="#">Community research</a> identified 7 high-impact capacities for development in Q1 and Q2</p>

<sup>3</sup> Learning Circle goals are to develop learning pattern frames for best practices for pitching, and tracking and reporting, GLAM-Wiki partnerships in order to work with GLAM community to develop toolkit patterns

## **Q4 - L & E**

- **Program Evaluation Reports got a 2.0 update** to include Community Voices, Executive Summary and a Focus on the So What? (e.g. How do we use evaluation reports to improve program design and performance across communities and serve as an initial data point for guiding investments?)
  - **Writing Contest Toolkit feature refinements based on community feedback.** Pilots a new feature for peer to peer knowledge sharing.
- **Released report on community capacity needs**, documenting for the first time on-wiki and off-wiki capacities for development, *as reported by emerging communities*. Seven high-impact areas were identified for further discussion and development in Q1, setting the stage for community specific engagement and action in following quarters.
- **Focus on Team Systems** put into place by new director include a strategic communications plan for all product launches to ensure we maximize product reach and impact; project charter system correctly scopes and sanity checks projects to prioritize investments. This work is directly aligned with workflow analysis and creation of the master project list.

# Q4 - L & E

## Quarterly Objectives: Misses

**Communicating our Work and Framing the Message for Community Value:** Release of our program report on “Wiki Loves Monuments” identified the need for an improved messaging strategy as well as report design changes. It also identified community sensitivity to the importance and need for qualitative data references, which extends beyond easily retrievable data such as quantity of photos or articles added.

### Learning:

- Make reports easier to read in bite size chunks. This will include a 4-minute presentation on how to use the reports - for those without time for extended conversations - as well as executive summaries of key findings.
- Enhance L&E and WMF brand by partnering evaluation reports with tools and resources for knowledge sharing; shifts our reputation from “Auditor” and more of a knowledge sharing “Partner”
- Community engagement *prior* to any release is key. This is now part of a strategic communications planning process, that carves out time for crafting product messaging to communities.



# Quarterly Review

## Community Resources

Q4 - 2014/15

Approximate team size during this quarter: 7 FTE

# Q4 - Community Resources

## Quarterly Objectives Summary

Objective	Measure of success	Status
<p>1. <b>Publish and socialize Capacities Development Framework (CDF)</b> for emerging communities  <i>Team members involved: 1 (CR), 1 (L&amp;E)</i></p>	<p>* Insights report, CDF framework published on meta            * 5 actions across 3 communities planned &amp; committed to for Q1</p>	<p><a href="#">Report and framework published</a>, with 7 areas identified &amp; prioritized for development into action</p> <p>Community-building actions planning pushed to Q1</p>
<p>2. <b>APG:</b> Ensure round 2 funding decisions are made based on impact analysis  <i>Team members involved: 2 (CR), 2 (L&amp;E)</i></p>	<p>Majority of FDC members indicate using past achievement reports in at least 70% of funding decisions.</p>	<p>The FDC's Round 2 <a href="#">funding decisions</a> were based on impact analysis of programs for 100% of submitted proposals.</p>
<p>3. <b>PEG:</b> Provide guidance materials for conference organizers  <i>Team members involved: 1</i></p>	<p>Publish conference program resources on meta-wiki</p>	<p>First draft <a href="#">published</a> for review by GAC.</p>



# Q4 - Community Resources

## Quarterly Objectives Summary

Objective	Measure of success	Status
<p>4. <b>Inspire:</b> Support more new gender-focused projects with impact potential  <i>Team members involved: 4 (CR), 1 (CA)</i></p>	<ul style="list-style-type: none"> <li>* 20 grants for \$250k or less</li> <li>* At least 50% of project leaders supported are women (increase from Q1&amp;2's &lt;30%)</li> </ul>	<ul style="list-style-type: none"> <li>* <a href="#">16 new gender-focused grants</a> for \$120k, increase PEG+IEG gender portfolio from 9% (H1 2014) to 18% (H1 2015)</li> <li>* 88% led by women, 81% first-time grantees.</li> </ul>
<p>5. Evaluate feasibility of <b>proactive grants</b> campaign strategy  <i>Team members involved: 3</i></p>	<p>Report published on meta with actionable recommendations to enable a go/no-go decision for running future campaigns</p>	<ul style="list-style-type: none"> <li>* <a href="#">Report</a> and <a href="#">blog post</a> published.</li> <li>* Planning to run 2 campaigns in next fiscal, if board approves annual plan w/ added community organizer</li> </ul>
<p>6. <b>Roll-out Friendly Space Expectations</b> to all grants spaces on meta-wiki  <i>Team members involved: 1 (CR), 1 (CA)</i></p>	<p>Consultation with CA and meta admins leads to expectations published for the grants namespace</p>	<p><i>In progress: review by staff complete, under review by grant committees. CA &amp; CR to complete review w/ admins and roll out in first month of Q1</i></p>

## **Q4 - Community Resources**

- **APG Funding decisions were correlated to impact**, *thanks to the analysis* provided on outcomes achieved and expected targets proposed.  
**Learning:** *Analysis is resource intensive* for CE but critical to good funding decisions. *Coaching grantees* on SMART objectives was effective.  
**People:** Katy, Winifred, Sati, Garfield & Jaime were instrumental in driving this
- **Inspire has doubled our gender-focused funding portfolio** (dollars spent on projects via PEG and IEG)  
**Learning:** *Focused campaigns can bring in new grantees and projects* aimed at strategic issues.  
**People:** Alex Wang and Marti Johnson worked overtime to make this happen
- **Wikimedia Conference messaging continued to rebuild trust** between WMF & affiliates. “I saw many changes towards a better, more open and more collaborative Foundation” - WMIT board member  
**Learning:** *Talking points* were an effective tool. Coordination with ED’s office needs to be improved.  
**People:** Asaf, Katy, Winifred and Alex have been working on affiliate relationships for several years, and their contributions to key messages was invaluable

## Q4 - *Community Resources*

- **Publication of the report on community capacity needs was pushed out** as staff time had to be reprioritized for community emergencies, leaving insufficient time for next step action-planning with specific communities.

**Learning:** By pushing back our deadline to *give communities adequate time to provide feedback before publication, and openly communicating the rationale for being behind schedule, we seem to have improved the ultimate reception of the research & its conclusions. In future timelines, we aim to build in extra buffer time to account for other responsive workflows.*

- **Implementation of the Friendly Space Expectations was pushed out** to early Q1 because of inadequate review time and conflicting staff schedules between CA and CR.

**Learning:** In future we will *do more to clarify and coordinate priorities between teams, provide extra time for staff and community review, and build in extra time to allow for community emergencies.*



# Quarterly Review

## *Wikipedia Education Program*

Q4 - 2014/15

Approximate team size during this quarter: **4.3 FTE**  
(2.8 permanent FTE, 1.5 contractor FTE)

# Q4 - Education

## Quarterly Objectives Summary (1/2)

Objective	Measure of success	Status
<p><b>1. Actively mentor program leaders worldwide</b> <i>Team members involved: 5</i></p>	<ul style="list-style-type: none"> <li>* 50% of interactions are initiated by community.</li> <li>* Connect 5 volunteers with <a href="#">Collab</a></li> <li>* Analyze current bottlenecks to engagement for Collab</li> <li>* 5 new programs report metrics</li> </ul>	<ul style="list-style-type: none"> <li>* Interactions in 40 countries</li> <li>* 67% of interactions initiated by community</li> <li>* Connected 6 people with Collab</li> <li>* Collab analysis complete</li> <li>* 6 programs reported metrics</li> </ul>
<p><b>2. Add content to Arabic Wikipedia</b> through expanding ed program <i>Team members involved: 2</i></p>	<ul style="list-style-type: none"> <li>* Determine viability of Omani education program pilot after visit to Oman</li> </ul>	<p>Deemed viable. Q1 focused on getting ready for pilot in the fall semester.</p>
<p><b>3. Add content to Spanish Wikipedia</b> (and sister projects) <i>Team members involved: 2</i></p>	<p>Co-organize 2 day <a href="#">education pre-conference</a> at Wikimania:</p> <ul style="list-style-type: none"> <li>* Invite global audience</li> <li>* Ensure engaging sessions</li> <li>* Host 4 sessions during pre-conference</li> </ul>	<p>On track for a successful pre-conference at Wikimania.</p> <ul style="list-style-type: none"> <li>* 94 people signed up (target: 40 - 60) in one week</li> <li>* 25 signups are international</li> </ul>

# Q4 - Education

## Quarterly Objectives Summary (2/2)

Objective	Measure of success	Status
<p><b>4. Provide materials for program leaders</b> and encourage community involvement <i>Team members involved: 1</i></p>	<p>* 10 community members add to / endorse <a href="#">Learning Patterns</a> (LP) in Q4</p>	<p>* 14 volunteers edited 10 LPs * 1 new LP by community member * 1 LP translated into 2 languages * 5,000 views of <a href="#">Ed Toolkit</a> pages (includes LPs)</p>
<p><b>5. Share lessons learned</b> with education and Wikimedia audiences and facilitate discussion and networking <i>Team members involved: 2</i></p>	<p>* Publish monthly <a href="#">newsletter</a>, with at least 10 contributions from community * Write one blog post about education per month * Facebook group: ** 50% community posts ** one post per week from Ed team ** 25% member growth in Q4</p>	<p>* 12 contributions from community to newsletter (April and May) * 3 blog posts written (1 published) * Facebook group: ** 55% community posts ** ~2 posts per week from Ed team ** 85% member growth in Q4</p>

# Q4 - Education

## Quarterly Objectives: Successes

**Facebook group:** Grew much more than expected (85% in one quarter).

**Learning:** There's a deep-rooted desire for people to connect, share their stories and learn from others, also through non-wiki channels.

**Berlin WMCON:** Great education team presence, great conversations.

**Learning:** Presence at in-person events goes hand in hand with resource development. It's where we socialize the resources we have, where we hear new stories and get a deeper understanding of needs.

**Wikimania pre-conference:** 94 people signed up in one week's time, greatly exceeding expectations.

**Learning:** Be prepared for anything when organizing a pre-conference :o)

# Q4 - Education

## Quarterly Objectives: Misses

**Collab:** Q4 focused on analyzing Collab bottlenecks to engagement and finding solutions. Limited capacity on team means Collab did not have the benefit of team defining improvements in early stage.

**Learning:** Our goal to go “light” on the organizational aspect of the Collab has left it with unclear expectations about what to do and how. We are redefining membership criteria, focusing on concrete actions that are transparent to the community. Stay tuned for updates in Q1.

**July 7th update:** Updated [Collab main page](#), new [membership request page](#) and new [open task list page](#).





# Quarterly Review

## Community Liaisons

Q4 - 2014/15

Approximate team size during this quarter: 6FTE, 1 contractor FTE

# Q4 - Community Liaisons

## Quarterly Objectives Summary

Objective	Measure of success	Status
<p>1. <b>VisualEditor</b>: Support communities and product team in discussion launch <i>Team members involved: 1</i></p>	<p>VisualEditor is prepared to launch with confidence from community and product team perspectives.</p> <p>Community Engagement holds successful conversations and notifications around VE development and launch.</p>	<p>The team has been <a href="#">supporting conversation</a> around a <a href="#">graduated release of VisualEditor</a> after the product team and A/B test resulted in a proposal to release VE to new accounts.</p>
<p>2. Complete responses to ideas in <a href="#">Product Process ideas page</a> <i>Team members involved: 2</i></p>	<p>Response to community ideas, supporting product inclusion process.</p> <p>Setting expectations on what is reasonable or not reasonable on product process</p>	<p>Not completed.</p>

# Q4 - Community Liaisons

## Quarterly Objectives Summary

Objective	Measure of success	Status
<p>3. <b>Complete SUL finalization</b> <i>Team members involved: 1</i></p>	<p>Single Unified Login complete, nearly three million accounts renamed, nearly five million accounts made global.</p>	<p>The objective was completed by the given ETA</p>
<p>4. <b><u>Document Workflows</u></b> <i>Team members involved: 2</i></p>	<p>Ensuring clarity of team tasks for ongoing development (internally and to community)</p>	<p>This is drafted but not finalized.</p>

## **Q4 - *Community Liaisons***

- **VisualEditor:** Message management is resulting in a civil, positive conversation
- **SUL:** An initiative [announced in 2004](#) has been completed. Over 200 volunteers were engaged on this project.
  - **Learning:** Community supported initiatives, early volunteer engagement and consideration of workflows was key to this project's success
- **Two new team members onboarded**
  - Benoît (France) and Johan (Sweden), bringing 18 combined years of onwiki experience to the team
- **Successful support of unplanned work**, including the https project

# Q4 - *Community Liaisons*

## Quarterly Objectives: Misses

- **Process ideas:** We were unable to finish triaging and responding to the Process Ideas due to changes in engineering & product.
  - **Learning:** This may have been an example of putting the cart before the horse; the process needs to be defined enough internally and consistently first. CLs aim to define a consistent community collaboration process in Q1, which will allow us to take another look at these ideas.
- **Workflows:** We began documenting these, but are working with the rest of the department to make them consistent.



# Quarterly Review *Community Advocacy*

Q4 - 2014/15

Approximate team size during this quarter: **6 FTE**

# Q4 - Community Advocacy

## Quarterly Objectives Summary

Objective	Measure of success	Status
<p>1. <b>Stewards visit</b> to San Francisco.</p> <p><i>Team members: 1</i></p>	<ul style="list-style-type: none"><li>* Develop an agenda for meetings and coordinate dates with stewards.</li><li>* Establish a date for this event by 6/5/15.</li><li>* Book office facilities as needed</li><li>* Coordinate with travel to provide travel/lodging</li></ul>	Completed late (6/20). Goal was 6/5.
<p>2. Board and FDC <b>Election:</b></p> <p><i>Team members: 2</i></p>	<ul style="list-style-type: none"><li>* Form a community election committee to ensure that the FDC Election (5/3) and Board Election (5/17) are executed.</li><li>* Ensure ease of candidacy, submission, and voting.</li><li>* Increase turnout and diversity of the candidate pool.</li></ul>	Completed on time.

# Q4 - Community Advocacy

## Quarterly Objectives Summary

Objective	Measure of success	Status
<p><b>3. Event bans and banned users</b></p> <p><i>Team members: 3</i></p>	<ul style="list-style-type: none"><li>* Produce a (legal-approved) list of global and event banned users</li><li>* Create a protocol for appearance (or threat of it) at events by banned users</li><li>* Supply to Conference Coordinators for events beginning in Q1 (6/30)</li><li>* Gather feedback and iterate.</li></ul>	Completed late (7/2). Goal was 6/30.
<p><b>4. Iterate on global ban process</b></p> <p><i>Team members: 2</i></p>	<ul style="list-style-type: none"><li>* Produce a proposed legal-vetted protocol and checklist by 4/30.</li></ul>	Completed on time.



# Q4 - Community Advocacy

## Quarterly Objectives Summary

Objective	Measure of success	Status
<b>5. Onboarding Kalli to emergency and legal-reports</b>  <i>Team members: 3</i>	Start date: 4/15, Shadowing by 5/4 and On call rotation by 6/1	Completed on time.
<b>6. Execute on core workflows</b>  <i>Team members: 6</i>	Ensure that 95% of contacts are handled within two working days of receipt; and that other workflows perform as required.	Completed on time.

## Q4 - *Community Advocacy*

## Quarterly Objectives: Successes and Learnings

- **Elections:** Broader translation and engineering's timely help with SUL and SecurePoll paid off in FDC and board election turnout.
- **Capacity issues on the team** meant we were late on two of our goals (one by several weeks, and one by three days.) With our now-increased team capacity and better goals this won't be an ongoing problem.
- **New CA staff onboarding:** Experiment in hiring externally (with transferrable and directly applicable skills) paid off. She's learning the wiki-specific things, but already knows Trust & Safety and was able to hit the ground running, decreasing ramp-up time.



# Quarterly Review

## *Engineering Community*

Q4 - 2014/15

Approximate team size during this quarter: 3-4 FTE

# Q4 - Engineering Community

## Quarterly Objectives Summary

Objective	Measure of success	Status
1. <a href="#">Most welcoming and productive Wikimedia Hackathon</a> <i>Team members involved: 2</i>	33 projects showcased At least 6 worth supporting 19% of participants were new volunteers 100% of newcomers had a buddy	Our bet on demoable projects and buddies was a success. Survey results available soon.
2. <a href="#">Successful start of all GSoC &amp; Outreachy projects</a> <i>Team members involved: 1</i>	100% passed the community bonding period and received their first payment	Participants are meeting expectations better thanks to public evaluation criteria.
3. <a href="#">Most basic Tech Community metrics are published</a> <i>Team members involved: 1</i>	Basic community metrics agreed on, implemented, and publically available.	Finally we have KPIs and a foundation for more sophisticated metrics.
4. <a href="#">Plan to focus on the developer audience</a> <i>Team members involved: 1</i>	Developer Relations proposal agreed and ready to start implementation	ECT to start conversion in Q1 through related quarterly goals.

# Q4 - *Engineering*

## Quarterly Objectives: Successes

### *Community*

- **Prototype of Developer Hub:** Dropped a quarterly goal on delivering a Data & Developer Hub prototype, due to the move of S Page to Reading.
  - **People:** Despite shift of team, **S Page** kept his personal commitment and [published the prototype](#) on time.
- **Hackathon projects:** Goal of hackathon was 8 projects; had 33 instead! It didn't require more work, just the willingness to work differently, and of course dozens of highly engaged developers.
- **Google Summer of Code/Outreachy:** Last winter, **Niharika Kohli** volunteered to help as co-org admin of Google Summer of Code and Outreachy in her volunteer capacity. This has allowed Quim Gil to focus on other tasks without any negative impact in these programs.

# Q4 - *Engineering Community*

## Quarterly Objectives: Misses

**Collaboration with Wikimedia France:** They were key for Hackathon's success, but their introduction of own ways of working increased our effort for no clear benefit.

**Learning:** We need to be more systematic defining expectations while still encouraging local initiative and a local style of event. We have shared this learning with Wikimedia Israel already, and we have agreed on documenting a guide for hackathon organizers as we go.



# Quarterly Review

## *Wikipedia Library*

Q4 - 2014/15

Approximate team size during this quarter: **2.3 FTE**  
(.15 Permanent FTE, 2.15 Contractor FTE)

# Q4 - Wikipedia Library

## Quarterly Objectives Summary

Objective	Measure of success	Status
<p><b>1. Enhance editor access to research</b> <i>Team members involved: 4</i></p>	<p>1) 8 new publishers; 2) 3 non-English publishers; 3) 400 accounts distributed; 4) 100 new users; 5) one new coordinator; 6) Plan to measure citation-impact; 7) Define metric for signup speed</p>	<p>1)Hit      6) Hit 2)Hit      7) Hit 3)75% 4)Hit 5)Hit</p>
<p><b>2. Scale the English Library model globally</b> <i>Team members involved: 4</i></p>	<p>1) 20 interested languages; 2) 4 branches in consultations, 3) 3 branches in page setup; 4) Renew activity with 3 existing branches; 5) develop TWL-lite model; 6) 8 total branches</p>	<p>All Hit</p>
<p><b>3. Share best practices and project models</b> <i>Team members involved: 2</i></p>	<p>1) 5 New Visiting Scholars; 2) US WVS to Wiki Ed; 3) Complete Interns model; 4) New Branches Project Menu and FAQ; 5) Initiate documentation on 4 community project models; 6) Consult on WVU Library WIR Grant</p>	<p>All Hit</p>



# Q4 - Wikipedia Library

## Quarterly Objectives Summary

Objective	Measure of success	Status
<b>4. Extend our network of influence</b> <i>Team members involved: 2</i>	1) Present at 4 major conferences; 2) Exhibit at ALA; 3) scope GLAM-Wiki role within Foundation; 4) 3 WMF Partnerships Brunches; 5) Outline draft of WMF partnership policy	1) Hit 2) Hit 3) Hit 4) 67% 5) Hit
<b>5. Plan for a future TWL platform</b> <i>Team members involved: 4</i>	1) Write development roadmap for LibraryCard Platform, Citation metrics, IP authentication (OAuth), and Reference tooltip guide; 2) Scope timeline for URL resolver, Link Rot, Echo notifications, and Citoid support	All Hit

# Q4 - *Wikipedia Library*

**Quarterly Objectives:  
Successes**

## **Global branches are starting up at scale**

- French language volunteers blitzed to set up 3 signups, redesigning the signup, train 2 coordinators, and write a blog post... in 1 week
- Turkish WP started a branch without even telling us, just using our setup kit
- Discovering new project models across local languages, helping us build a menu of projects for communities to try, especially smaller wikis

## **Great networking presence**

- GLAM-Wiki, DPLAFest, Wikimedia Conference, Project MUSE Keynote, and ALA where we exhibited and presented

**Added 11,931 links** to partner resources in Q4

## Q4 - *Wikipedia Library*

Despite nearly 40 partnerships, we have **only 300 to 400 quarterly signups**.  
(290 received access this quarter with another 158 awaiting distribution)

### **Cause -> *Solution***

- Lack of direct invitation & publicity -> *need to use Echo or central notice*
- Individual signups -> *need to make simultaneous-signup possible\**
- Hacky password distribution -> *need to streamline access transfer\**
- Some partnerships are low value -> *need to focus on impactful donations*
- Unfamiliarity with donated content -> *need integrated search exploration\**
- Global rollout still ongoing -> *need more global branches with partners*
- High requirements -> *we only lowered them mid-way through the quarter*

Starred (\*) solutions will be incorporated into our Library Card Platform



# **Appendix**

## ***Learning & Evaluation***

Q4 - 2014/15

# Q4 - L & E

## Core workflows and metrics

### Community Research

- Community Health - Wikimania Learning Campaign
- Community Health - Project Charter

### Program Design & Evaluation Support

- Survey and Evaluation Design Consultations
- Wikimania Learning Day outreach and prep
- Wikimania Session Outreach & Planning ([Leveraging Volunteers through Wikimedia Programs](#), [GLAM Learning Circle](#))
- Inspire campaign evaluation prep
- Storytelling coaching
- [Virtual Meet-up](#)

### Tools Support

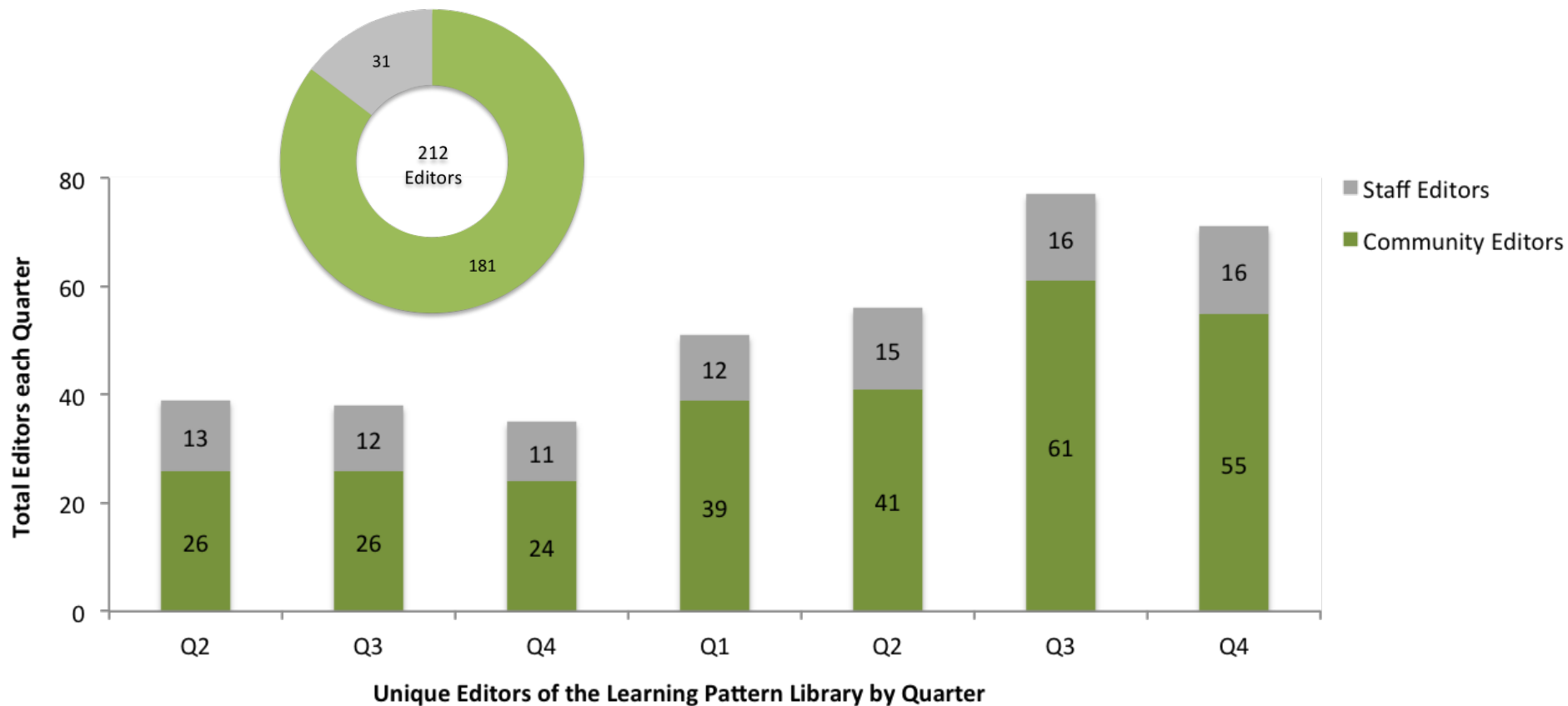
- Several tools sessions (4-5 hours workshop time) and consultations at WMCON: Surveys, Wikimetrics, Global Metrics, Category Tools, Education Extension
- [Learning Pattern Library Growth](#)

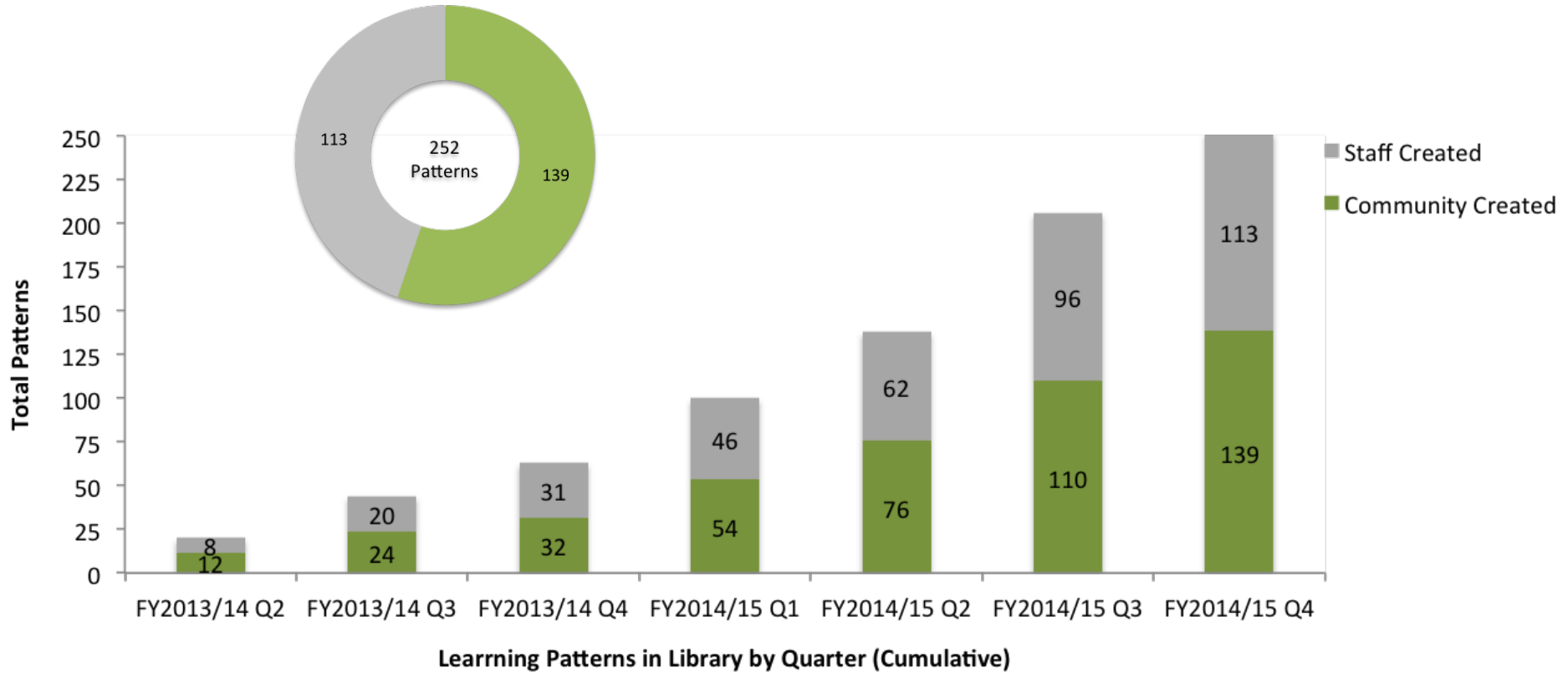
### Community Support

- Wikimania Learning Day outreach and preparations
- Communications: (in order of frequency)
  - Social media ([Portal](#), [Facebook](#), [Twitter](#))
  - [Announcements](#)
  - Communication plans ([Writing Contests Toolkit](#), [Writing contest evaluation report](#), [General Comms plan for Evaluation Reports](#))
  - [Blogs](#)
  - [Learning Quarterly Newsletter](#)

### Team & WMF Admin

- Monthly reports and L&E coordination meetings
- Wikimania CE Engagement planning and production ([general planning doc](#))
- Onboarding of Director of L&E
- Workflow mapping ([Revised Office Page](#))
- Project Charters & Strategic Communications Plans





## Education Program

[Start](#) [Plan](#) [Run](#) [Evaluate](#) [Connect](#)

Wikipedians and educators have taught students around the world to contribute to Wikimedia projects. This toolkit contains resources they have tested and refined over the last ten years. Within each section of the toolkit, you will find strategies and solutions to plan, grow and scale up your education program.



The idea behind the Wikipedia Education Program is simple: educators and students share free knowledge by contributing to Wikipedia and Wikimedia projects in an academic setting. Wikipedia is being used as a teaching tool in education around the world ([see list of countries](#)). In some parts of the world, the academic setting is a traditional classroom and the editing is for a course assignment. In some parts of the world, students contribute to Wikimedia projects for community service, or as part of a club or a camp, or at campus edit-a-thons, hackathons and workshops. And in some parts of the world, teachers learn Wikipedia editing as part of their teacher training.

### Success factors:

- Start small, grow smart.
- Work with the community.
- Teach to student ability.
- Focus on motivation.
- Use tech tools to make work easier.
- Set goals and track progress.

### How to use this toolkit [\[edit\]](#)

Use the navbar to navigate through the different sections in this toolkit:

[Plan](#) [Run](#) [Evaluate](#) [Connect](#)

1952  
Education  
Toolkit  
page  
views

New!  
Writing  
Contests  
Toolkit

## Writing Contests

[Start](#) [Plan](#) [Run](#) [Evaluate](#) [Connect](#) [Forum](#)

Contests are about so much more than creating content!

Find tools and share advice on how to start and improve writing and editing contests.



The Wikiverse is full of different kinds of contests. Each one is unique. The planning templates below can help you choose a contest model that your community will love and that works with the resources you have available. You can find quick links to resources in these templates or get more in depth planning tools in the tabs.

[Short-term, Specific Topic](#) [\[show\]](#)

[High Edit Volume](#) [\[show\]](#)

[Content Gap](#) [\[show\]](#)

[Long-term, General topic or action](#) [\[show\]](#)

[Cross-Wiki or Regional Contest](#) [\[show\]](#)



## Evaluation portal

A hub for learning and sharing resources to better understand Wikimedia programs.

*Are you reaching your goals? Measure your program's success!*

### News and Events



**Wikimedia Impact Evaluation:**  
Learn how we evaluate grants and programs.



**What happened at pre-conference sessions on the last WMCON?**



**New blog! Evaluation helps Wikimedia Leaders learn together**



**New Learning Day at Wikimania México!**



### Study

- Glossary
- Learning modules • (+)



### Plan

- Program resources
- Logic models • (+)



### Measure

- Reporting and tracking
- Wikimetrics • (+)



### Share

- Learning patterns
- Evaluation reports • (+)



### Connect

About  
Community  
Frequently Asked Questions  
Contact Us

**1,609** portal  
landing page  
pageviews

### Evaluation portal



## Learning Patterns Library

### Create an Event Page

I need to make an event page, for a contest or something else.

LAST UPDATED: 06 JULY 2015



### Writing Contest Topic Selection

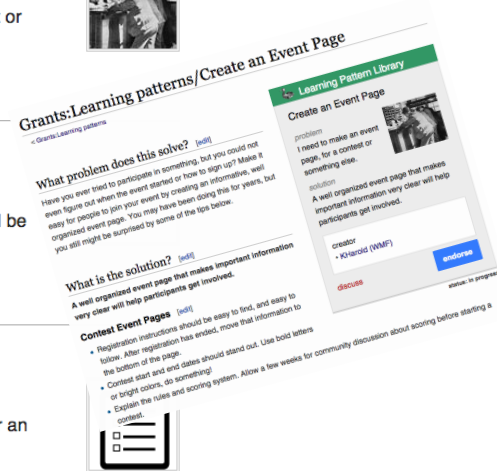
I want to pick a writing contest topic that will be popular with new or existing editors.

LAST UPDATED: 06 JULY 2015

### Writing Contest Work Lists

I do not know if I should make a work list for an editing contest.

LAST UPDATED: 06 JULY 2015



**1,251** library  
landing page  
pageviews



# **Appendix**

## ***Community Resources***

Q4 - 2014/15

# Q4 - Community Resources

Core workflows  
and metrics

**36 new grants funded at \$1,458,354 to 25 countries**

Type of grants	# of grants	Amount in dollars	Proportion	
			# of grants	\$ of grants
Annual Plan Grants*	5	\$1,248,913	14%	86%
Individual Engagement Grants	6	\$84,000	17%	6%
Project & Event Grants	21	\$121,187	58%	8%
Travel & Participation	4	\$4,254	11%	<1%
<b>Total</b>	<b>36</b>	<b>\$1,458,354</b>	<b>100%</b>	<b>100%</b>

\* Board decisions expected June 30; APG amounts reflect FDC recommendations.

# Q4 - *Community Resources*

## Diversity breakdown of new grants in Q4<sup>[1]</sup>

Diversity of grants	Number of grants	Amount in dollars	Proportion of total <sup>[2]</sup>		% change from Q2	
			# of grants	\$ of grants	# of grants	\$ of grants
Individuals	21	\$163,800	58% of total	11% of total	+36%	+17%
Global South	15	\$350,574	42% of total	24% of total	-22%	+7%
Gender Gap	22	\$126,658	61% of total	9% of total	<b>+244%</b>	<b>+340%</b>

[1] Why do we track this diversity? Because WMF explicitly aims to fund:

- not only organizations, but also individuals
- not only Global North communities, but also Global South
- projects aimed at addressing the gender gap

[2] Column will not add up to 100% because a grant can be tagged in multiple categories

# Q4 - *Community Resources*

## Core workflows and metrics

### Other core workflows that took significant staff time this quarter

#### **Responding to requests from WMF depts:**

Average hours per team member: *5-15*

Spike hours 1 team member spent on just 1 request this month: *80 hours*

**Committee elections:** *20* hours of staff time to elect 5 new FDC members and an ombuds

**Team travel:** *13 weeks of FTE staff time* spent traveling this quarter on 6 community events/site visits

Event	FTEs	Time per FTE
Wikimedia Conference	6	1 week
WM Sweden/Serbia site visit	2	1 week
WM Argentina site visit	1	1 week
WM Armenia visit	1	10 days
WikiArabia Conference	1	1 week
Glam-Wiki Conference	2	1 week

# Q4 - *Community Resources*

## Appendix

### Why research “community capacity”?

#### Our Plan

- Interview community members across 16 communities/countries<sup>[1]</sup>
- Aim to understand:
  - Environmental context
  - Community structure & norms
  - Capacity needs

#### Our Goals

- **Build a baseline** of capacities
- **Identify challenges, gaps & opportunities**
  - Both across and within communities
- **Build community capacity & efficacy** by improving paths for support, mentorship, and partnership

#### Phase 1 Outcomes

- **Seven capacities identified** for Q1 community discussion & prioritization
  - New contributor engagement & growth
  - Community governance: Roles, Policies, & Conflict management
  - On-wiki tech. skills
  - Communications
  - Partnerships

[1] Interviews were conducted with 32 community members across the following communities / countries: Indonesia, Mexico, Philippines, South Africa, Turkey, Ukraine, India (English, Hindi, Malayalam, Marathi, Tamil, Telugu, Urdu) and the Arabic community. Still coming: Brazil.

[https://meta.wikimedia.org/wiki/Community\\_Capacity\\_Development\\_Framework/Community\\_Research](https://meta.wikimedia.org/wiki/Community_Capacity_Development_Framework/Community_Research)

### Piloting online Friendly Space Expectations

#### Phase 1: IdeaLab

- **First ever online Friendly Space Expectations piloted** in [IdeaLab](#) during the Inspire Campaign in Q3.
- **Received support** from meta admin community and Inspire participants.
- Was referenced during challenging discussions.

#### Phase 2: Grants space

- After review by staff, grant committees, and meta-admins, **revised expectations will be implemented on the Meta-wiki grants namespace in next Q1.**
- **Escalation plans** for diverse scenarios are underway.

#### Phase 3: Other spaces

- Experimenting with online Friendly Space Expectations in a heavily-trafficked space (Grants) will provide insight into (1) how it can be **expanded to other online spaces** and (2) discussions around **addressing civility more broadly.**

### Inspire Campaign<sup>[1]</sup>

#### Achievements

- Massive scaling of idea creation (4000% YoY)
- Increased gender diversity (committee members, grantees)
- Geographic & project diversity (89 countries, WP+4 sister projects)
- Process innovations (Friendly space, etc)

#### Challenges

- Language, social and technical barriers still remain
- Ideological opposition to a gender-focused campaign
- Process confusion

#### Recommendations

- Increase community support/organizing
- Improve messaging
- Better ways to connect ideas and people
- Prioritize friendly spaces
- Debug all tools
- Improve multilingual support
- More time for grant proposal development

[1] See the [blog post](#) and [full campaign report](#) for more information.



# Q4 - Community Resources

## Appendix

### APG round 2 grants

Organization	2013-14 Grant (\$)	2014-15 Grant (\$)	Increase from last year
Centre for Internet & Society	\$194,000	\$194,000	0%
Wikimedia Armenia	\$90,952 (PEG)	\$123,891	N/A
Wikimedia France	\$671,418	\$604,276	-10%
Wikimedia Italy	N/A	\$166,680	N/A
Wikimedia Norway	\$168,544	\$160,142	-5%
Wikimedia South Africa	N/A	Withdrew	Withdrew

# Q4 - *Community Resources*

## Appendix

Quotes from the FDC's recommendation texts, as FDC focuses APG [round 2 funding decisions](#) based on impact:

“the FDC is concerned with [Wikimedia France's] growth in staff as well as the **lack of clear and recognizable impact**...as well as a **lack of continuity of targets**.”

“Wikimedia Norge's GLAM program is **effective** and has demonstrated **good outcomes**.”

“Wikimedia Armenia has presented a high quality proposal with **SMART objectives** that is both clear and detailed....”

“approximately half of WMAM's budget is dedicated to Wikicamp, and while it appears to be a **successful program with impressive retention rates** at the moment, the **impact of this program (e.g. retention rates)** should be closely monitored alongside the expenses.”



# **Appendix**

## ***Wikipedia Education Program***

Q4 - 2014/15

# Q4 - Education

## Core workflows and metrics

[Education team workflows](#): An overview of the 12 main workflows to keep our work going. Summary:

1. Develop & socialize offline & online resources
2. Grow Arabic Wikipedia
3. Program leader growth
4. Active participation in Wikimania
5. Gather data
6. Assist in affiliate events
7. Grow and support the Wikipedia Education Collaborative
8. Tech tools support
9. Communications
10. Broader relationship-building
11. Support Lila, C-levels and board members in worldwide travel
12. Build education team strategy and report internally



# **Appendix**

## ***Community Liaisons***

Q4 - 2014/15

# Community Liaison Workflows

## Plan community engagement processes within product teams

- **Support** decision making around rollout locations and audiences and planning engagement strategies.
- **Drafting and implementing** communications to communities around product and engineering events.

## Turning user feedback intake into Phabricator tickets and actionable tasks

- **Converting onwiki requests, complaints and observations** into Phabricator tasks; holding conversations to clarify and request more information, update and offer feedback, and support community requests.
- **Creating and updating internal documentation** to collate and quantify feedback (spreadsheets and other docs).

## Facilitating public meetings around product development

- **Triage meetings**, announcing and handling the posting of logistical information; facilitating during the meeting.
- **IRC office hours** – periodic product and engineering initiatives, communication with users.

## Creating newsletters and other outbound communication to communities

- **Individual product newsletters.** VisualEditor, the largest of publications, is delivered to 381 individual subscribers and 443 project pages.

## Engaging volunteer translators in updating documentation created by product teams

- **Sourcing** and engaging translators of engineering documentation.
- **Translathons** – initiating and engaging volunteer editors in translation documentation pages so that users understand new products.
- **Newsletter** translations to localize information.

# Community Liaison Workflows

## Engaging users in surveys and other online testing of products

- **On-wiki and off-wiki surveys** around individual products (such as the VE Papercuts-style survey).
- **Polls** around what users want to see built (such as AllOurIdeas).

## Managing conversations around product rollouts and WMF product initiatives

- **Decision-making conversations** (like RfCs) about product requests.
- **Community consultations** to determine needs for product development.
- **Connecting users and product teams** by directing users to the right teams and venues to find more information and supporting/facilitating online conversations.

## Supporting other Community teams in engaging users

- **Ensuring proper coverage** of other team's initiatives where needed and possible, such as during 2015 strategy consultation.
- Other short-term tasks as needed to support organizational priorities.

## Wikimania, Hackathon and Conferences

- **Demonstrating product** uses and new features to users.
- **Connecting and introducing** community members with product team staff and facilitating their discussions.
- **Wikimania and regional/chapter conferences** - holding formal sessions and discussions around individual products or how communities can collaborate effectively with the WMF product teams.



# Appendix

## *Community Advocacy*

Q4 - 2014/15



# Community Advocacy workflows

**Direct community support: We step in to facilitate interactions among volunteers, WMF and the public.**

- Change management and support for program roll-outs
- OTRS support.
- Liaison work: to the arbitration committees, the stewards, checkusers, oversighters and other global functionaries.
- Legal support: DMCA takedown and notification requirements, search warrant and subpoena compliance, Right to be forgotten notices. (*note: RTBF slated to Transition to legal*).
- Correspondence support: [Answers@Wikimedia](mailto:Answers@Wikimedia), Business@wikimedia, postal mail
- Mailing list product ownership.
- Internal-I mailing list and Internal-wiki. (*note: slated for archival status, will not be maintained*)

# Community Advocacy workflows

**Trust and Safety:** we step in to ensure the safety and integrity of our users, our contributors, and the public.

- Global bans
- Identification and access rights for community (*note: Largely going away soon with transition to LegalPad*).
- Evaluation and reporting: Child pornography reports, Emergency@Wikimedia
- Contact database management. (*note: Could go away, if we move to another CRM*).

**Internal support:** we provide guidance and advice to Foundation staff, the Board, and committees.

- Supporting the Executive Director, the Executive Office, Jimmy Wales.
- Liaison work: to the Election Committee, the ombudsmen, and other WMF teams.
- Staff support: Advanced privileges and user rights for staff, community onboarding



# **Appendix**

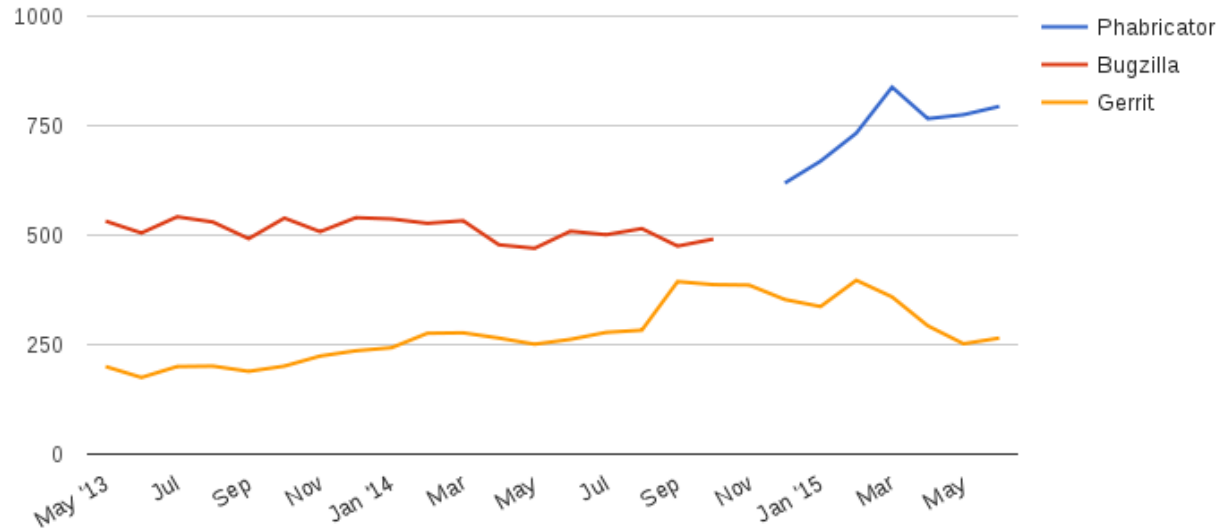
## ***Engineering Community***

Q4 - 2014/15

# Q4 - *Engineering Community*

## Core workflows and metrics

Proposed Metrics: Active Phabricator users and active Gerrit users on a monthly basis



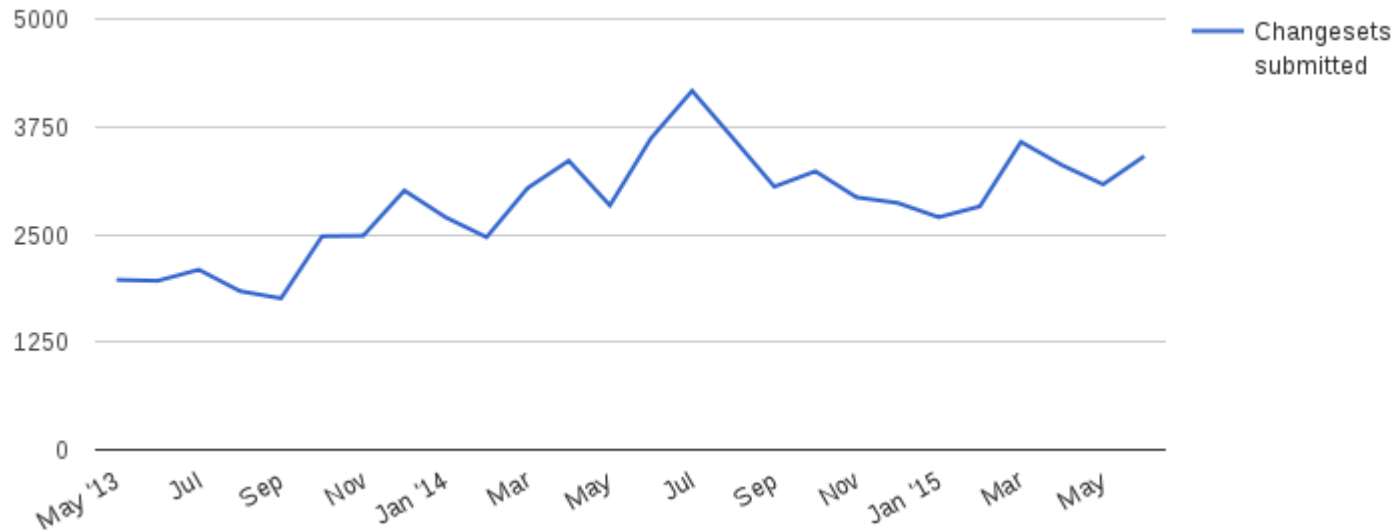
Phabricator: [https://www.mediawiki.org/wiki/Community\\_metrics#Reports](https://www.mediawiki.org/wiki/Community_metrics#Reports)

Gerrit: "Code review users" at <http://korma.wmflabs.org/browser/scr-contributors.html>

# Q4 - *Engineering Community*

## Core workflows and metrics

Proposed Metrics: Changesets submitted on a monthly basis

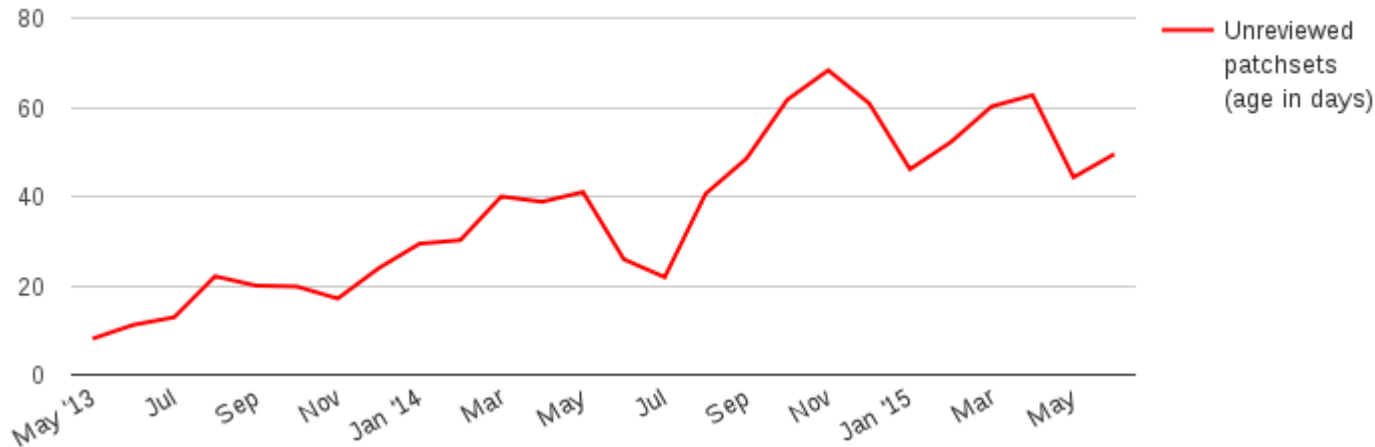


Changesets submitted: "submitted" in <http://korma.wmflabs.org/browser/scr.html>

# Q4 - *Engineering Community*

## Core workflows and metrics

Proposed Metrics: Median age of patchsets waiting for review on a monthly basis



Median age of patchsets waiting for review: "Age of open changesets" "Time from last patchset" in

[http://korma.wmflabs.org/browser/gerrit\\_review\\_queue.html](http://korma.wmflabs.org/browser/gerrit_review_queue.html)



# Appendix

## *The Wikimedia Library*

Q4 - 2014/15

### **Deliver research access donations**

- \*Develop publisher relationships and pitch publishers for donations
- \*Create on-wiki infrastructure for access partnerships
- \*Global announcements of new access opportunities
- \*Track user feedback and access needs
- \*Maintain relationships with publishers
- \*Manage distribution when volunteers are unavailable

### **Pilot and document project models**

- \*Establish visiting scholars and interns programs, through outreach to universities
- \*Document library initiatives for project menu

### **Build global programs**

- \*Help new global branches of TWL setup
- \*Grow and track existing branches

### **Manage people, processes, and metrics**

- \*Recruit, onboard, and manage volunteer coordinators
- \*Documenting TWL processes on-wiki
- \*Measuring impact, quality, and spread of projects

### **Share communications and outreach**

- \*Manage Twitter and Facebook
- \*Write Books & Bytes newsletter and blog posts
- \*Present at library conferences
- \*Liaise with information professionals

### **Conduct technical research and tool-development**

- \*Develop tools that improve reference workflows and Library processes

### **Build TWL strategy integrated with WMF planning**

- \*Review and improve TWL team performance
- \*Manage our budget, quarterly goals, and annual planning throughout WMF process

### **Deepen community partnerships at WMF**

- \*Advise Community Engagement, Advancement, and Executive team on Libraries & Partnerships
- \*Develop a role for GLAM at WMF
- \*Run Partnerships Brunch meeting and mailing list
- \*Develop WMF partnerships guidelines



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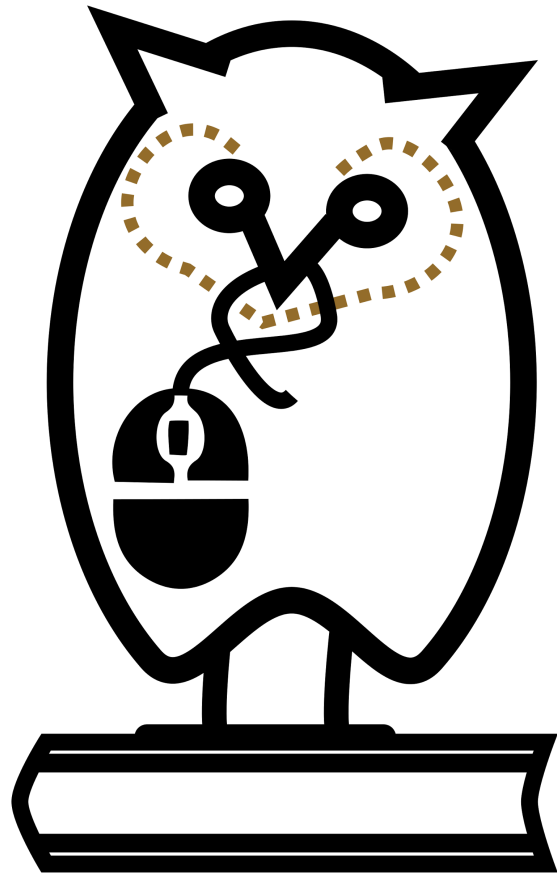
**مکتبة ويكيبيديا**

**Die Wikipedia-Bibliothek**

**The Wikipedia Library**

**La bibliothèque Wikipédia**

**کتابخانه ویکی‌پدیا**



Phase 1  
2012

**English**

Phase 2  
2014

**Arabic**  
**Chinese**  
**German**

Phase 3  
April '15

**Spanish**    **Turkish**  
**Norwegian**    **Finnish**  
**French**    **Farsi**

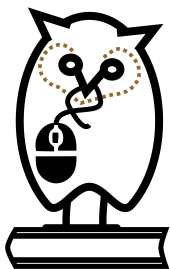
Phase 4  
July '15

**Hebrew**  
**Dutch**  
**Swedish**  
**Estonian**

**Nepali**  
**Cantonese**  
**Serbian**  
**Slovakian**

Phase 5...  
Oct '15

**Hindi**    **Korean**  
**Indonesian**    **Japanese**  
**Sundanese**    **Polish**  
**Javanese**    **Italian**  
**Telugu**    **Tagalog**  
**Ukrainian**    **Bengali**  
**Catalan**    **Yoruba**



# Global Rollout

