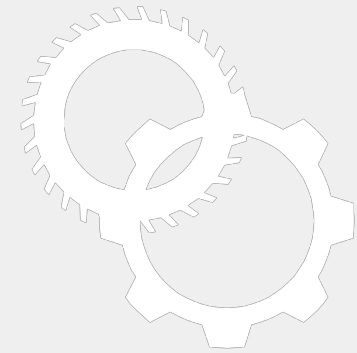# Grantmaking Quarterly Review

April 2, 2014

Agenda

- Data: Grantmaking Overview from Q2-3   *(5 min)*
- Integration: *Grantmaking + PED + Education*   *(10 min)*
- Global South   *(10 min)*
- Grants Programs: *Individual Grants*   *(45 min)*
- Break   *(5 min)*
- Learning & Evaluation   *(45 min)*
- Next Steps   *(30 min)*

The focus of Q3

1. Increase support to individuals

2. Publish programmatic evaluation reports

3. Decrease the burden of grantmaking requirements

4. Integrate the new team

The focus for Q4 and FY14-15

1. Support individuals, experiment with scale

2. Articulate relative value-add of specific Wikimedia programs and organizations

3. Build capacities, tools and data for self-assessment

4. Provide more resources to the Global South, explore growth of medium-sized communities
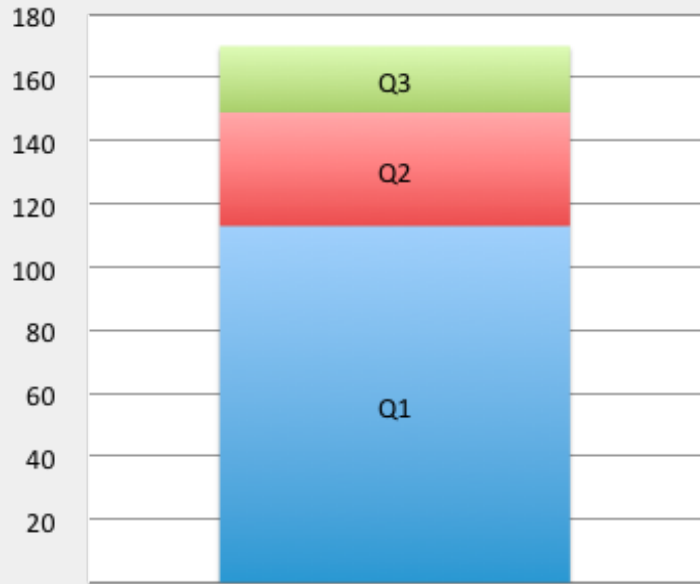
5. Optimize grants requirements

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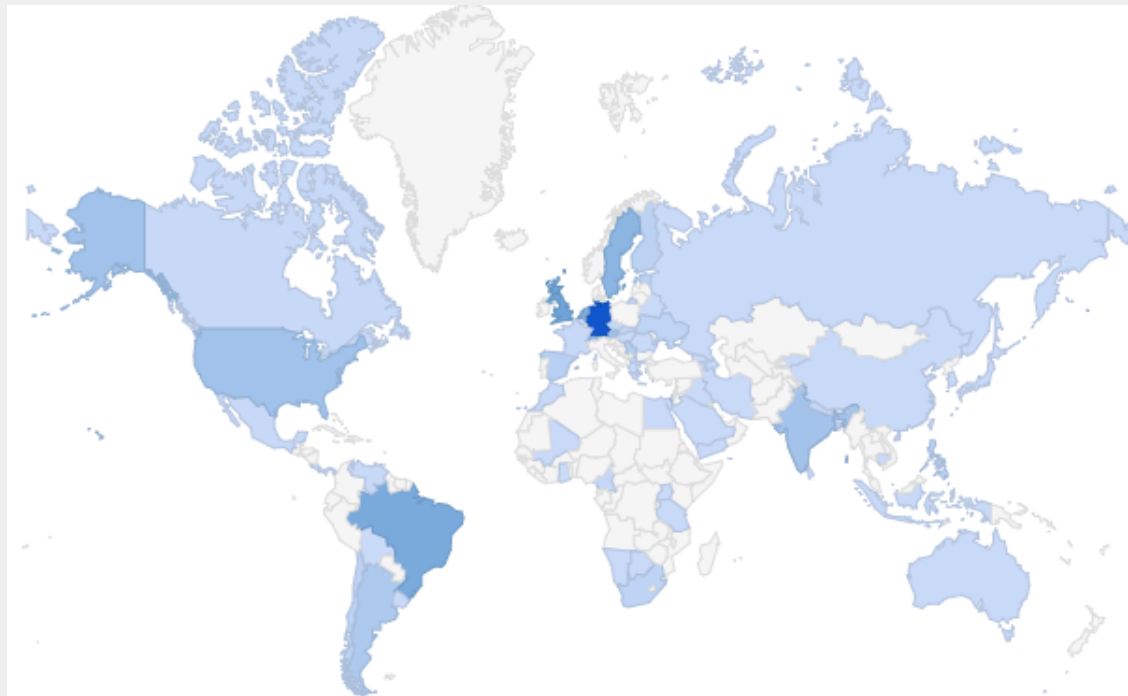- Learning & Evaluation
- Next steps

Year to date, we have supported individuals and groups in 64 countries through 170 grants
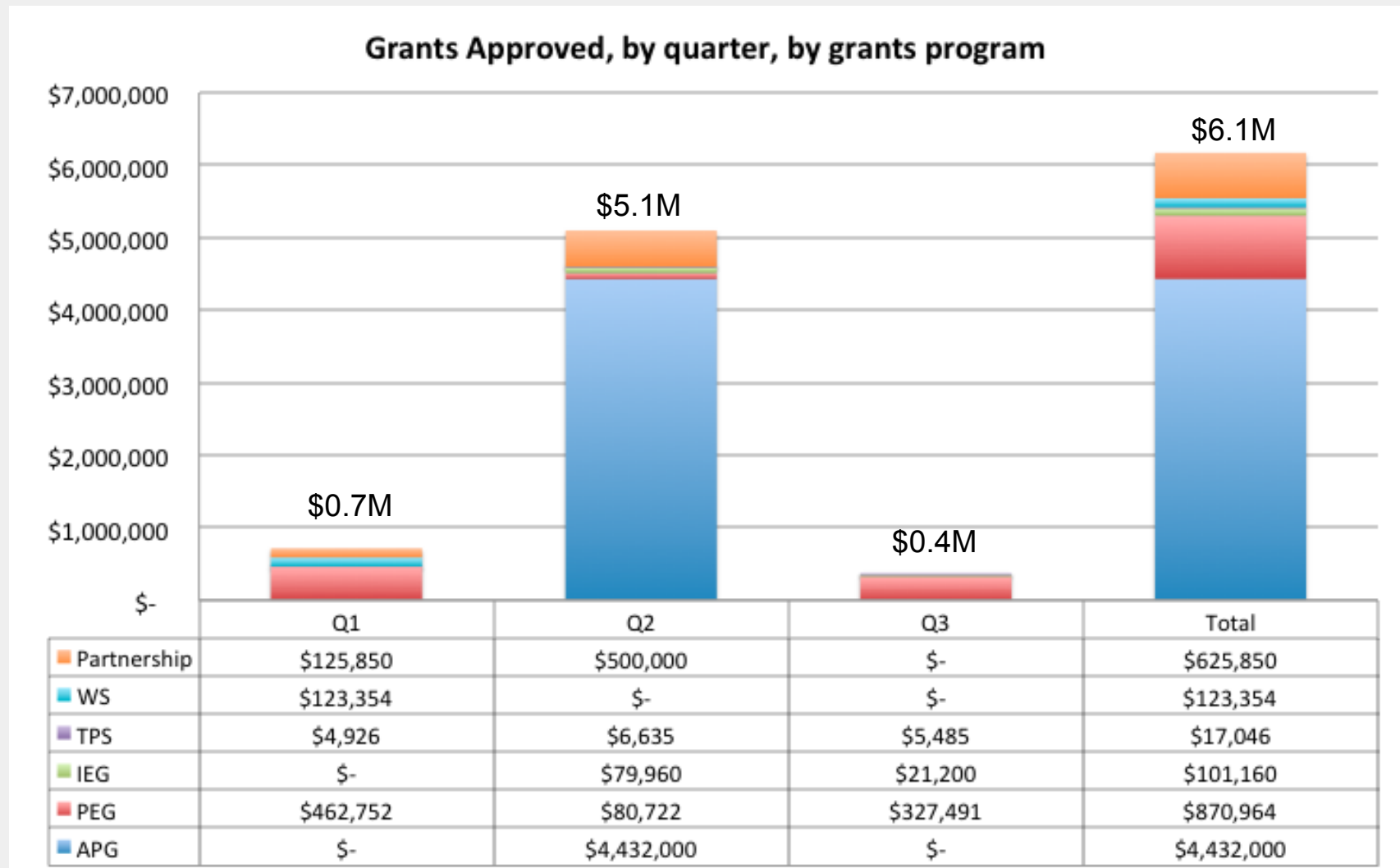
Total number of grants by quarter

Grants by location
(by $ amount)

Number of grants by quarter (170, total)

Heat map: darker blue is higher spend

Note: Exclude $300K funding for Wikimania

So far in 2013-14, we have distributed 80% of the total grantmaking funds ($6M distributed)

Grants Approved, by quarter, by grants program

	Q1	Q2	Q3	Total
■ Partnership	$125,850	$500,000	$-	$625,850
■ WS	$123,354	$-	$-	$123,354
■ TPS	$4,926	$6,635	$5,485	$17,046
■ IEG	$-	$79,960	$21,200	$101,160
■ PEG	$462,752	$80,722	$327,491	$870,964
■ APG	$-	$4,432,000	$-	$4,432,000

Note: Excludes the $300K funding for Wikimania; "WS" = "Wikimania Scholarships"

Progress against strategic goals

	Goal	Target (as % of grants expenditure)	Q1-Q3 2013-14 Actual (of grants by amount)	Q1-Q3 2013-14 Actual (of grants by number)
	Funds to **Global South**	**10%**	**20%**	51%
	Funds to **Individuals**	**7%**	**4%**	68%
	Funds to **Gender gap work**	**1%**	**0.2%**	3.5%

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Project & Event Grants

Grants for Individuals

Annual Plan Grants

Grantmaking offers resources (money+)

Learning & Evaluation

Global Education

Connection points & opportunities

Focus on the global communities

Global South strategy & gender diversity

Volunteer and organization-led education initiatives

Program support resources to individuals and groups

Integration points

Team and community tools
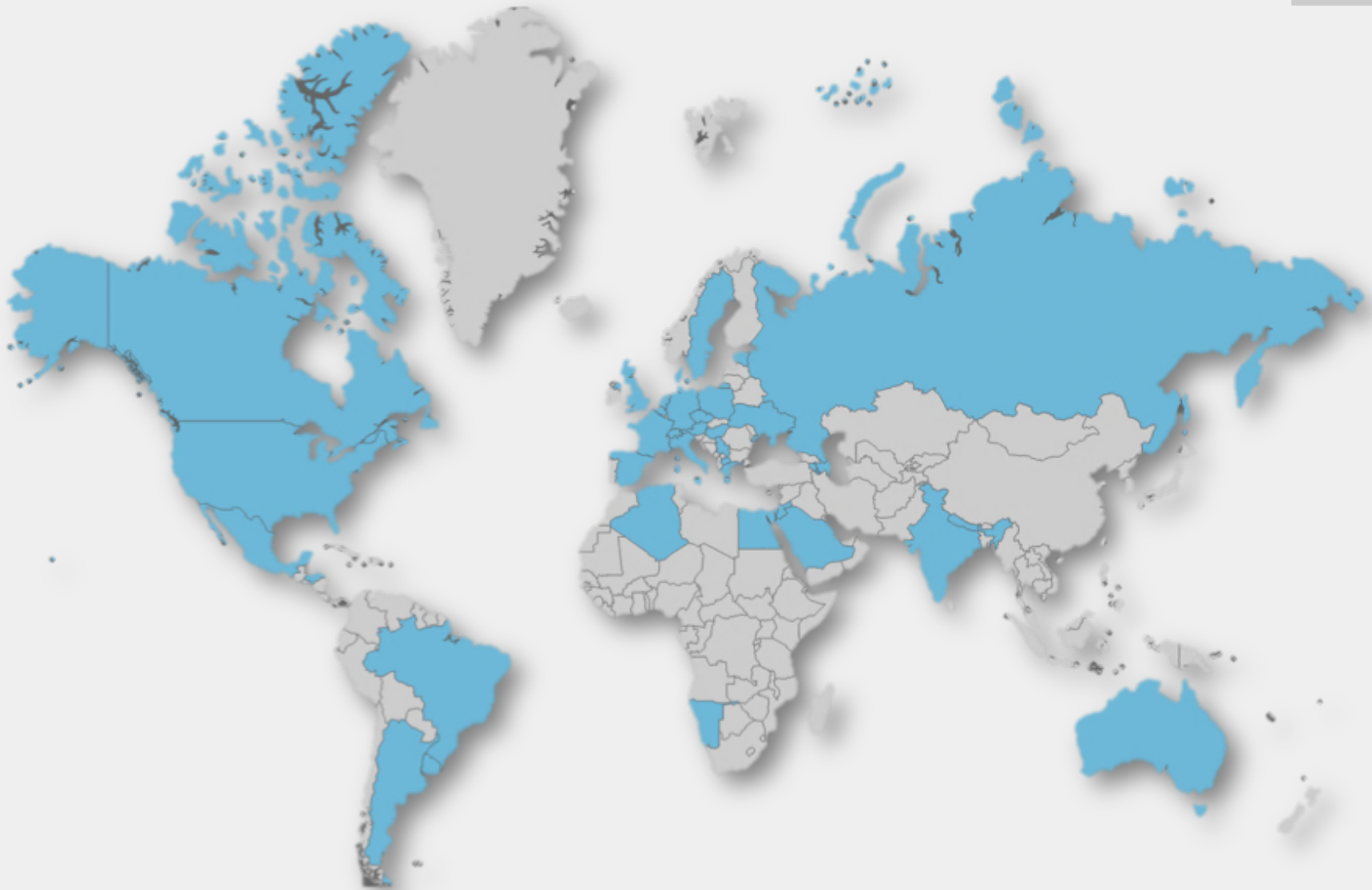(e.g. Wikimetrics; Fluxx)

Program design and evaluation
(e.g. collecting and sharing best practices; program kits)

Capacity building and volunteer support
(e.g. training, tools, networking and funding)

Communication

Educational initiatives
in over **60** countries

Arab World

Egypt

1 University; 8 main classes

109 students (-60%)

7.8 million bytes added (-33%)

67k bytes per student (+53%)

88% women; one female admin

Jordan

2 universities; 2 schools; classes*

88 students (+57%)

1.2 million bytes added (+485%)

14k bytes per student (+270%)

69% women**

* class model is not as applicable in Jordan   ** Primarily in IT classes and faculties in Jordan

Global Education Cooperative

Global Education Cooperative Kick-off
Author: ragesoss, cc-by-sa-2.0

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Global South partnership updates - India

CIS (India) Learnings:
- CIS's language strategy is innovative and interesting, advised by a language expert
- currently high-touch and high-involvement; questions of sustainability and day-after acknowledged
  - supporting more depth in community leadership is likely to be next step
- Clear results in growing editing communities in smaller communities -- TE (>50% increase in act. ed.), KN (~30% inc. in act. ed.)
- More infrastructural work in tiny communities (OR, GOM [KOK])
- Significant responsive support to community reqs. (+TA, ML)

Global South partnership updates - Brazil

AE (Brazil) Learnings:
- OER mapping making progress
- Education program underway with AE support, and with a teaching hospital
- Traction with initiatives difficult in face of lack of timely responses and weak interest from community
- Mid-term review and site visit planned

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Grants to Individuals: Potential for scale

How do we distribute resources

to support **as many individual contributors as possible**

to have the **most impact** on Wikimedia projects?

Hypothesis 1: microgrants

Hypothesis 2: supporting community organisers

Microgrants: what we've learned

Problem	⟶	Solution
Lacking data about what small resources individual editors most need	Arabic community consult	**Sources**, by popular request
Giving $ triggers bureaucracy *(OFAC checks, legalese, and international banking fun!)*	Legal & finance consult	**Give stuff**. Book travel for people. Send pre-paid debit cards for per-diems.
Global communities have varied own cultural norms, but scale favors cookie-cutter solutions	The Wikipedia Library model	**Satellite on home wiki.** Flexible kit w/ menu of options. Local coordinators w/ community context.
Staff can process a limited number of requests *(stuff needs a shipper, finance needs an approver)*	The Community Organizing model (TWL, OTRS, IEG)	**Volunteers** can be supported by staff to process limitless requests

Microgrants Experiment: Book Requests
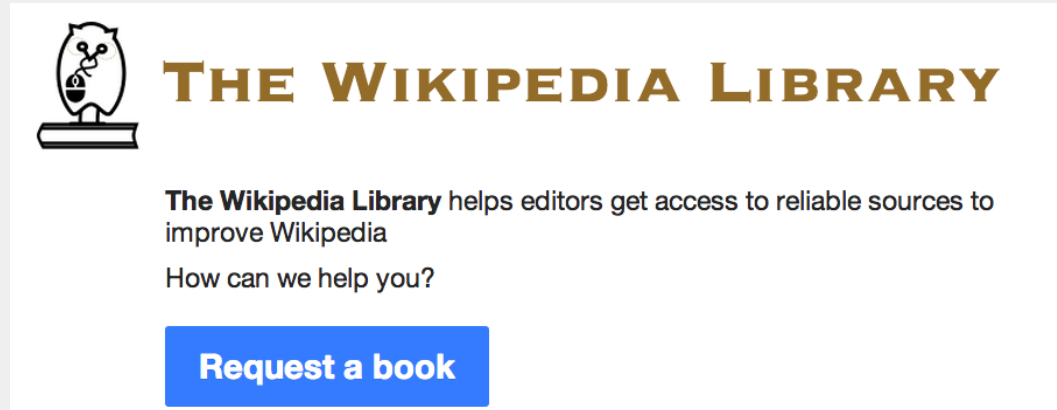*brought to you by the Arabic Wikipedia Library & WMF Grantmaking*

amazon.com

nwf.com
نيل وفرات.كوم

مكتبة ويكيبيديا

THE WIKIPEDIA LIBRARY

Microgrants Strategy: *Trust in God but tie your camel*

simple requirements

> **THE WIKIPEDIA LIBRARY**
>
> **The Wikipedia Library** helps editors get access to reliable sources to improve Wikipedia
>
> How can we help you?
>
> **Request a book**

...of editors:

- **want a book?** 200 edits, link to reliable source for sale, link/sentence how you'll use it for Wikipedia
- **want another book?** link to article improved last time

...of coordinators:

- **want a debit card to purchase and ship books?** 1 year editor, good community standing, NDA
- **want to process more books?** snapshot of well-spent funds

Microgrants: Next steps

Pilot in Arabic: April - June

Measure outcomes*

- ○ #books requested, approved, received
- ○ #editors participating, articles improved
- ○ staff & coordinator time (~150 hours for pilot setup so far)
- ○ community satisfaction

Iterate, scale, or try something different

Plan for a post-grant TWL

Take improved systems to TPS & Wikimania scholarships

- ○ ex/ low-limit debit cards, shortened agreements

*https://meta.wikimedia.org/wiki/Grants:IdeaLab/ARWP_small_individual_grants_pilot

Supporting community organizers: what we've learned

IEG 2013 r 1 impact report:

"Strongest IEGs seem to be the ones that **build some sort of platform** -- a social media group, a curriculum, a library, a strategy -- and have **demonstrated the possibility** for that platform to have **impact on a smaller (beta) level.** These projects were explicitly designed to meet an **expressed need in the community**."*

online community organizing

= ↑ impact potential

*https://meta.wikimedia.org/wiki/Grants:IEG/Learning/round_1_2013/impact

How IEG supports community organizing
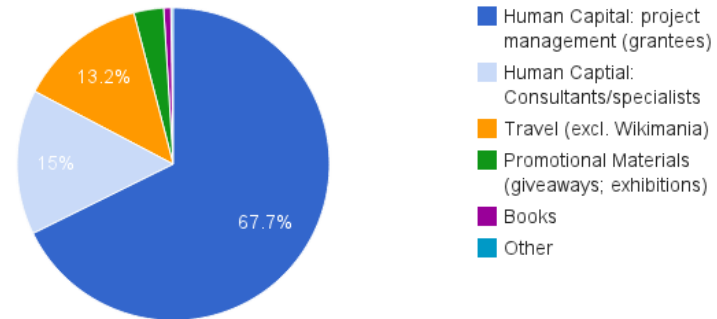
IEG 2013 r 1 impact report:

Safe-to-fail
experimental environment

Mentorship

IEG Grantee spend by budget area

- Human Capital: project management (grantees)
- Human Captial: Consultants/specialists
- Travel (excl. Wikimania)
- Promotional Materials (giveaways; exhibitions)
- Books
- Other

67.7%
15%
13.2%

Money for people's time

*https://meta.wikimedia.org/wiki/Grants:IEG/Learning/round_1_2013/impact

Return on Investment:
IEG community organizing has a multiplier effect

The Wikipedia Library   *$7500 IEG > 1 grantee > 4 community organizers > 1500 editors*

= 3700 free accounts worth over $500,000, 400-600% usage increases of those references

Chinese Social Media   *$200 IEG > 1 grantee > 3 community organizers > 10,000 readers*

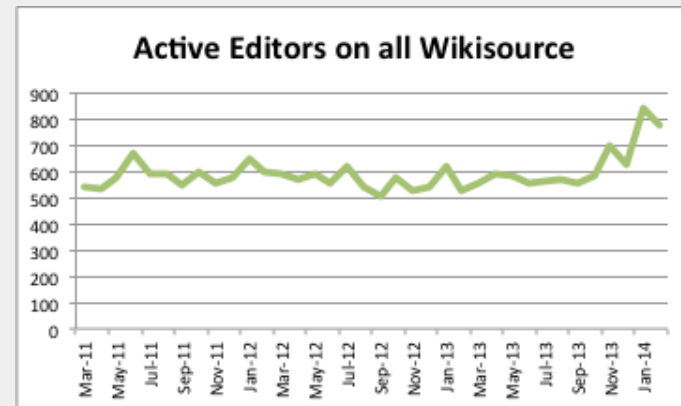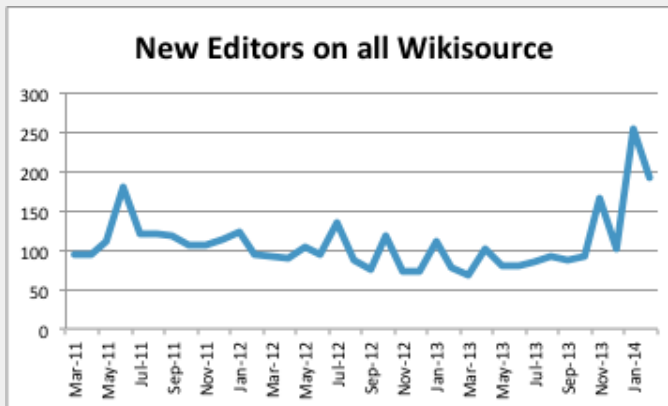= Estimated 252% increase in pageviews on top promoted articles

Wikisource Strategy   *$12,000 IEG > 2 grantees > 40 member user group > hundreds of Wikisourcers*

=

*https://meta.wikimedia.org/wiki/Grants:IEG/Learning/round_1_2013/impact

Supporting community organizers: Next steps

Double down on experiments w/ high impact potential

- ○ IEG renewals

Select future IEGs based on learning from past impact

- ○ proposal forms, selection criteria, learning patterns

Testing group mentorship

- ○ recruiting more volunteer advisors
- ○ Hangouts

IdeaLab worksprint

- ○ simple ideas > actionable project plans
- ○ volunteer experts > mentors & team members
- ○ competition experiments

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Learning & Evaluation:
primary priorities for the next quarter

- **Team integration**:
  Combining L&E to provide unified community face/voice

- **Program Evaluation**:
  Continuing to understand the impact of Wikimedia programs

- **Optimize grants requirements:**
  Supporting spaces to make it easier for our grantees (e.g., learning patterns; IdeaLab; key metrics across grants programs)

Program Evaluation

Wikimedia Programs:

Evaluation Report ^(beta)

- Good sense of program designs and goals

- Initial baseline of range of inputs, outputs, and outcomes

- Understanding of reporting burden

Program Evaluation: Next Steps

Facilitating self-evaluation and building capacity

- Deepening the data and reporting

- Easing evaluation data collection, tracking, and reporting through guidance and tools

  ➢ Tracking and reporting toolkit

  ➢ Wikimetrics

  ➢ Survey Tools and Consultation

Program Evaluation: Next Steps continued

Fostering collaboration through community coordination

- Training and support resources
  - ➢ Virtual and in-person meet-ups
  - ➢ Portal learning modules and learning patterns
  - ➢ Program toolkits
- Online dialogue
- Follow-up strategies

Major blocker in impact evaluation: GEODATA

What we can still do without it:

- Some internal-use only benchmarking
- Project-specific impact analysis (non-relative to geography)
- Language-based evaluation for some grants

What we lose if we don't have it:

- Ability for self-monitoring by grantees, the effectiveness of geography based funds in areas with cross-cutting languages
  - E.g., Partnership priorities India & Brazil (~$700K)
  - E.g., Annual Plan Grants Germany, Austria, UK, Switzerland, France, India, Argentina (total $3,224K) and others

- Ability to make *public*, data-informed funding decisions in certain areas of the world
  - E.g., Wiki Indaba ($50K) and others

- [WMF's] Ability to *publicly* track our progress against our strategic goals
  - From Strategic Plan: *"Global South editors to 37 percent"*
  - Impact of Global South proactive strategy in priority geographies/associated languages (2013-14 Budget = $130K)

- Ability to monitor programs in relationship to their local community/content baseline
  - E.g., share of editors coming from Egypt through Education program vs Arabic

- Ability to seize opportunity! Watching for emerging opportunities for growth

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Priority next steps - overall

- Support individuals, experiment with scale
  (*redesign of TPS; Arabic pilot; TWL*)

- Articulate relative value-add (RoI) of specific Wikimedia programs and organizations
  (*deepen data on programs; program toolkits; org effectiveness modules*)

- Build capacities, tools and data for self-assessment
  (*Wikimetrics; learning modules/patterns/hangouts; dashboards as possible*)

- Provide resources to the Global South, explore growth of medium-sized communities
  (*action plans for priority regions; education coordination with grants*)

- Optimize grants requirements
  (*Fluxx implementation; learning patterns into reports; simplified requirements; consistent minimum metrics across reports*)