

Operations Q3 FY19/20 Tuning Session



WIKIMEDIA
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Key Deliverables Update



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Organizational Efficacy



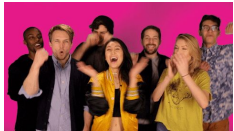
Objective:

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

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



For **sustainability**, we **performed our environmental impact survey and completed data collection for our annual carbon** footprint assessment. We also hosted our first Sustainability Consortium discussion for staff working on projects that align with the Foundation's sustainability framework. Our **281 metric ton All Hands offset resulted in an emission reduction equal to the electricity usage of 47.6 homes for one year.**



For **staff rewards**, we initiated our pilot for manager-to-report and peer-to-peer recognition. As of April 4th, **77 staff members have been recognized** for their performance, values, leadership practices and growth. While 85% of staff created accounts access rewards, utilization - redeemed vs non-redeemed, is currently at 11.5%.



For **distributed work**, we **completed a live poll to obtain insights** for the creation of a remote toolkit. We also partnered with staff from Design Research to host an **All Hands breakout session focused on the remote worker experience.** Development of a cross-departmental distributed culture OKR with Ops, Office of ED, and T&C is underway.

Target quarter for completion: Ongoing



Department: Operations

Organizational Efficacy



Commonalities exist among challenges and experiences among staff at the Foundation. As such, with focused effort and resources, we have an opportunity to positively impact the distributed worker experience.

Live polling survey key learnings

- **77% response rate**, Total respondents = 298, Total staff at time of survey = 384
- Over 200 staff spend **\$50 or more on internet services**
- Almost $\frac{2}{3}$ of respondents **do not feel they received adequate remote training or guidance**
- $\frac{1}{3}$ of staff experience 4-6 mtgs per day
- **Common concerns: Too many meetings**, and agreement on meeting times
- Isolation: Almost $\frac{1}{2}$ of respondents **feel they are not connected**
- Staff also have concerns around loneliness / lacking close relationships with and the inability to unplug

Breakout session themes

- Isolation / Socialization
- Time zones
- Culture
- Global Equality
- Technology

Top staff-suggested opportunities for improvement

- Dedicated internet and onboarding stipend
- Standardized remote work training, standardized tools



Department: Operations

Organizational Efficacy



Key Results

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status
Sustainability Deliver three milestones: policy statement, framework, KPIs Baseline: 0 of 3 milestones	3 milestones	milestones in progress	3 milestones completed	-
Staff rewards Deliver three milestones: process mapping, pilot, retrospective evaluation Baseline: 0 of 3 milestones	3 milestones	milestones in progress	1 milestone completed	1 milestones completed
Remote toolkit Deliver three milestones: survey, recommendations, toolkit Baseline: 0 of 3 milestones	3 milestones	-	1 milestone completed	milestones in progress



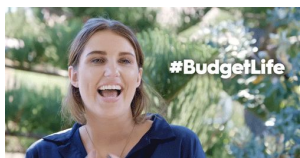
Resource Stewardship



Objective:

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

Our current Resource Stewardship efforts have been focused on annual planning execution and pivots in partnership with F&A.



Partnering with our Learning & Evaluation team, we **finalized our organizational efficacy and resilience framework**, affectionately known as ERF. **ERF describes the work we do outside of the scope of the five Medium Term Plan priorities** and replaces the legacy term “Core”. It is intended to standardize the work we do now and in the future, regardless of our strategic priorities and will be utilized to refine the granularity of our financial reporting.

We also completed Phase 1 of annual planning:

- Each department performed an OKR assessment to identify potential FY20-21 organization deliverables, resulting in a **proposed 28 MTP OKRs and 62 ERF OKRs**
- Expenditure **budget guardrails were established** to inform to budget owners of the financial resources they will have available before they begin detailed planning
- The APP team facilitated a first-pass proposed OKR assessment with C-team, evaluating **OKR sequencing, dependencies, readiness and impact**

Currently, annual planning is pausing to give all of us time through what may be a challenging few weeks. It will also allow the fundraising team the time it needs to gather data to help project future revenue.

Department:
Operations

Target quarter for completion: Q1

Resource Stewardship



Key Results

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status
Annual Planning Deliver three milestones in partnership with Finance: development of Efficacy and Resilience Framework (ERF), process improvements, annual budget Baseline: 0 of 3 milestones	3 milestones	1 milestone completed	1 milestones completed	final milestone in progress
Opportunity Fund Deliver three milestones in partnership with Finance: process mapping, template development, training Baseline: 0 of 3 milestones	3 milestones	3 milestones completed	-	-



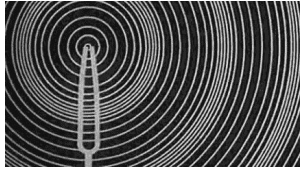
Operational Rigor



Objective:

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

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



Working with Comms, we **updated our presentation template** to ensure efficient preparation of board materials and expand the quarterly snapshots of key results.

Adjusting to the current environment and reduced work-week schedule, we **modified our Q3 session to span over four days** to ensure that participants won't have to allocate more than 2.5hrs per day.

As with each Tuning Session, we **completed a prep-review of all 160+ submitted slides** for content, clarity, and consistency.

Target quarter for completion: Ongoing



Operational Rigor



Key Results

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status
Tuning Session Operations Deliver four quarterly Foundation metric reviews Baseline: 0 of 4 milestones	4 milestones	1 milestone completed	2 milestones completed	3 milestones completed
Tuning Session Design and Implementation Deliver four milestones: cross-departmental framework design, Key Deliverable metric clean up workshops, Tuning Session training and implementation Baseline: 0 of 4 milestones	4 milestones	4 milestones completed	-	-



Leadership Practices



Objective:

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

Our Leadership Practice work in Q3 was focused on execution of All Hands.

We invested in our staff via a week of onsite collaboration, leadership development, organizational alignment and the opportunity to get to know one another better through work, fun, activities and celebration. The All Hands Planning Committee and the C-Team **designed a survey for staff to provide feedback**. This information to help improve future iterations of All Hands and other staff events.

Survey Highlights

- **55% response rate**, Total respondents = 213, Total staff at time of survey = 384
- **More than half of respondents rated the general sessions and workshops favorably**
- Of the 162 comments about overall impressions of All Hands, 74% had a positive impression, 14% had mixed reviews, and 12% had a negative impression. The number one benefit of All Hands, according to comments, is the **opportunity to connect with colleagues/meet new people/make friends**
- Among the 42 comments that were negative or mixed, there were two recurring reasons, **exhaustion from a long week and a design that felt too top-down**
- About $\frac{3}{4}$ of staff were satisfied with their Department Day and Team Day sessions. The number one complaint was **not enough time**.

Department: Operations

Target quarter for completion: Q3

Leadership Practices



Key Results

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status
All Hands Deliver two milestones: event design and execution within budget Baseline: 0 of 4 milestones	2 milestones	-	1 milestone completed	1 milestone missed



Department Update



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Learning & Evaluation

Q3 Deliverables



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Monitoring



Objective:

Developing systems to monitor MTP and key program metrics so staff know what to fund, scale, or stop and how to plan for the future.

Wikimedia Affiliate Data Portal: The portal has been launched to the community! Affiliate response has been very positive and we are currently tracking/fixing bugs and collaborating with the Comms Dept to ensure word gets out.

Annual Affiliate Survey: Survey collection closed, and analysis is underway. The report is a little delayed by the COVID-19 disruptions and pushed out by a month to May instead of end of April, still with a Q4 completion date.

Affiliate compliance & recognitions monitoring system: Both pipelines are now public facing on Meta, in a bid by Affcom to improve transparency.

Thriving Movement metrics reporting: A method for measuring underrepresented forms of knowledge has been identified by L&E and Technology Research. Efforts to define which knowledge gaps to measure have been delayed by the COVID-19 pandemic, but are still on track for Q4 completion.

Full-time equivalent budget

Actual: 1.5 FTEs (1.0 Dumisani, 0.25 Jaime, 0.25 Dana)



Monitoring



Key Results

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status
Launch Wikimedia Affiliates Data Portal Baseline: 0 of 28 total milestones	23 milestones	5 milestones	7 milestones	6 milestones
Affiliate compliance and recognitions monitoring Baseline: N/A	100% On Time Monitoring & Recognitions (Q-o-Q)	100%	100%	100%
Deploy annual survey to Affiliates Baseline: 0 of 8 milestones	8 milestones	2 milestones	2 milestones	2 milestones
Measure and report on 7 of the Thriving Movement medium-term plan metrics Baseline: 0 of 7 metrics	7 metrics	0 metrics	5 metrics	5 metrics



Program Evaluation



Objective:

Measuring impact on leadership development & movement diversity.

Events Impact Evaluation

- In Q3, a 6-month follow-up survey (194 respondents) and three attendee focus groups (17 participants total) were completed for Wikimania.
- Planning has been initiated with the Events team to develop an evaluation framework for the entire events ecosystem. The remaining 2 milestones for this project will be completed in Q4.

Grants Impact Evaluation

- We are hiring a Grants Evaluation Strategist to ensure we accurately measure the return on investment and effectiveness of our \$7 million grantmaking budget.
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Full-time equivalent budget

Actual: 0.6 FTEs (0.5 Becky, 0.1 Dana)



Program Evaluation



Key Results

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status
Evaluate participant response and outcomes of Wikimania 2019. Baseline: 0 of 7 milestones	7 milestones	1 milestone	2 milestones	2 milestones
Create a framework for evaluating the impact of the entire events ecosystem. Baseline: 0 of 3 milestones	3 milestones	N/A	N/A	1 milestone
Hire a grants evaluation strategist Baseline: Vacant	Role Filled	N/A	N/A	Role posted



Community Research



Objective:

Conducting and compiling research about our Wikimedia communities' gender, age, education, geographic, and language diversity & equity.

Equity Index

- The [equity landscape data and dashboard mock-up](#) were shared at the All Hands Data Party in January. This led to the analytics team enabling csv uploads to superset for our future dashboard development.
- In March, we integrated COVID19 prevalence data and related health system metrics into our landscape analysis to enable use for response planning (see below).

Community Insights Survey

- Key analyses of the survey data were completed and preliminary results were shared out as data placemats with 11 groups at the Foundation.

COVID Landscape Report

- In response to the growing pandemic, we pulled together an [interactive report](#) overviewing global risk, resilience, and how those considerations map onto our affiliates landscape.
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Full-time equivalent budget

Actual: 1.25 FTEs (0.75 Jaime, 0.5 Becky)



Department: Operations

Community Research



Key Results

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status
Develop and share Equity Index and use equity landscape data for planning Baseline: 0 of 10 milestones	10 milestones	N/A	1 milestone complete 2 in progress	2 milestones complete 1 in progress
Execute, analyze, and report out key data from the Community Insights survey Baseline: 0 of 8 milestones	8 milestones	3 milestones	1.5 milestones	2 milestones



Community Events

Q3 Deliverables



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Community Events



Objective:

Curating an events ecosystem with regional platforms, thematic hubs, offline spaces for technical contributors and an amazing community Flagship event

To ensure the safety of staff, contractors and volunteers, we cancelled all events until the COVID-19 pandemic is declared over.

Wikimania

- By responding quickly to the circumstances, we were able to pause negotiations and protect our financial exposure. Zero investment was lost on event postponement, and we maintained partnership relationships by committing to host event in the same region in 2021.
- We paused efforts on our Scholarship CRM system to improve alignment of objectives, identify a project owner, and specify roles and responsibilities

Conference Grants

- We developed and implemented a new funding model for community events to align with regional, thematic, and community growth strategies once grant submissions resume in September. Three events were cancelled and guidance was provided on how to repurpose funds to apply towards mission-aligned efforts, other programmatic work, or send back to the Foundation.
- In alignment with the Safe and Secure Spaces deliverable, we partnered with Trust and Safety to implement a Mandatory Friendly Safe Space Policy and corresponding training as a part of the grants acceptance process.

Technical Events

- Though the Hackathon was cancelled, just \$5K of total investment spend was lost. Current efforts are focused on reformatting TechConf to better support the needs and Tech and Product departments.

This quarter we are exploring the development of a flash funding program to provide resources for local communities to convene and work on affiliate-specific efforts.

Community Events



Key Results

	Y1 Goal	Q1 Status	Q2 Status	Q3 Status
Strategic model for funding community convenings according to Thriving Movement impact metrics Baseline: High level budget identified	3 milestones	N/A	1 milestone	3 milestones
CRM tool for scholarship process - Operational Baseline: Existing system	5 milestones	N/A	N/A	3 milestones

