

A Grant's Life

WMF Grant Program Review

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Goals of Talk

1. Inform the entire movement about the WMF Grants program, and seek suggestions for improvement
2. Increase number of grant applications
3. Maximize number of grants that would be approved
4. Maximize number of grants that are completed successfully
5. Inspire chapters to create/cultivate their own Grants programs
6. Improve knowledge sharing about grant programs within the movement

Pleased to Meet You!

- My name is Asaf Bartov -- אסף ברטוב
- I'm working for the Wikimedia Foundation
- My job title is Head of Global South Relationships
- I'm also in charge of the WMF Grants program, globally

Other hats:

- I'm a longtime Wikipedian (since 2001). My home wiki is the Hebrew Wikipedia (since 2003).
- I had been a board member at Wikimedia Israel
- I am founding editor of Project Ben-Yehuda, a Hebrew equivalent to Project Gutenberg predating Wikipedia (est. 1999)
- I hack on open source software, linked data, and library software

Goal of WMF Grants Program

provide
funding
for
strategy-aligned initiatives
with a strong
focus on innovation
and on
making a qualitative difference

What can we learn from
experience of the grants
program so far?

Learning from Past Experience

- Grants are fairly new (est. 2009)
- Process was based on meta pages and sporadic attention by WMF staff with numerous other duties
- Remarkably, it worked: many grants were successfully completed and probably achieved their goal
- Some grants didn't work out so well
- Reporting and recording of lessons learned was weak
- Relatively few applications were made, by relatively few chapters
- Lessons learned:
 - Clearly identified staff in charge of the process and of reporting
 - Clarity on process and goal of program
 - More community involvement
 - More attention to capturing knowledge

Attitude

- Grants are means to leverage movement resources to accomplish movement goals.
- Asking for a grant is not a sign of weakness. On the contrary: it is a sign of initiative and thoughtfulness!
- Chapter success is not measured on amount of funds raised
- Chapters distinguish themselves by the quality of the programs they're running

A Grant's Life

Idea (1/2)

- Come up with a **mission-aligned** idea for an activity, event, or program
 - A good match with the Foundation's **strategy** helps, but **is not required**
 - Try to break new ground -- if not something completely new, at least something not done before in your language/territory
 - Feel free to take programs others have run successfully and adapt them to your chapter/group
 - The WMF will be curating a "program catalog"

Idea (2/2)

- Grants funded by the WMF should make a **qualitative difference**; they should make possible things not otherwise possible, not just speed up or widen or enlarge existing initiatives
- Grants should not come instead of **outreach and liaison** efforts with sponsors, allies, and like-minded local groups.
- Grants should not fund salaries or recurring expenses (but there may be exceptions)

Preparing for a Proposal

- Gather as many ideas as possible
- Discuss within your group
- Optionally, discuss with larger community (home wiki, movement-wide); do you have community support?
- Identify resources needed
- Identify opportunities for getting resource in in-kind donations
- Can you do it without a grant?
- Reach out to the WMF and run ideas by us

Proposal

- Create a "funding request" on Meta at [\[\[Grants:Index\]\]](#), filling the template, with special attention to:
 - Brief, clear description of the **goal and scope** of your proposed activity
 - Clear statement about how it **advances** WM in your local context
 - Budget requirement (give details!)
 - Non-financial requirements
 - Proposed timeline
 - **Measures of success**
 - Contact information
- Make sure you **have** the human resources (people, time) to carry out the plans, if your request gets funded.

Review

- Proposals are reviewed for fitness to strategy and mission, for potential impact, and for realistic timelines and plans.
- New for 2011/12 - review will be conducted in several stages:
 - Initial review by Grant Advisory Committee (to be designed and appointed by WMF soon)
 - Community Feedback and Request Revision period (to be added to grants pages on Meta)
 - Decision announced (all grants will be publicly announced)
- We are now able to review grant requests year-round
 - (but earlier is better)

Approval

- If your funding request is approved, along with the money, you get access to advice and non-financial resources from the WMF (e.g. contacts), and regular follow-up
- If your request is not funded, I will indicate why, *and* offer advice about possible changes to increase the likelihood of its getting funded
- I will be spending a significant amount of time working with the community to come up with better grant proposals

Execution and Progress Reports

- Execute your plan with the funds provided by the WMF
- Manage the project as carefully as possible, with regular re-assessments of progress vs. resources vs. timeline, and **update** the plan and your WMF contact whenever changes (unforeseen obstacles, timeline slippage, external delays)
- Do not hesitate to ask for more advice or resources if your group is facing a difficult decision or an impasse
- Respect the fact you are handling donor money by being prudent and frugal in expending it
- Remember: it's best to **communicate** about difficulties or mistakes

Completion and Final Report

- When the grant-funded activity is over, it is **very** important to:
 - Sort out the finances -- amount spent, amount left (if any), invoices and receipts if required -- before everyone forgets or loses context
 - Analyze the project: execution vs. plan, plan strength in retrospect, etc.
 - Write it all up in a final report (start early! consider a project diary)
 - If any sensitive information is included, it is highly recommended to create a public version without that information, so everyone in the movement can benefit from the experience and insight
 - What doesn't work is important too!

Accumulated Wisdom for the Ages

- Beyond the final report, it would be great to distill some of the main insights (especially anything unforeseen) from it and to try to contribute it to the "program catalog" I'll be curating, or to other relevant pages on Meta etc.

Chapter [Micro-]Grants Programs

- **Everything** stated so far could make sense in the context of a single chapter as grant-giver
- Chapter grants are an excellent way to let Wikimedians (whether or not chapter members) accomplish great things with the leverage of funds they are otherwise unable to muster
- The scale of chapter grants need not be the same as the WMF's.
- Chapters as grant-givers have advantages of familiarity with territory/language and the volunteers
- Microgrants are easier and good for **experimentation**

Resources and Examples

One-stop resource:

- [\[\[m:Grants:Index\]\]](#)

Example grants:

- [\[\[m:Grants:WM CZ/Digitalization equipment\]\]](#) (equipment)
- [\[\[m:Grants:WM ID/Free Your Knowledge Project 2010\]\]](#)
(outreach, competition)

[\[\[m:Grants:WM AU/Outreach conference\]\]](#) (outreach, event)

- [\[\[m:Grants:WM IL/Legal Opinions\]\]](#) (legal)

Thank You

Imagine a world in which every single Wikimedian has access to the resources of the entire Wikimedia movement. That is my commitment.

Make it better!

Q&A, criticism, and suggestions for
improvement