

03

Regional Fund Committees and Applicants' perceptions

How do they evaluate the new funds strategy? How engaged do they feel? Do they feel supported?

*All this data is collected through surveys

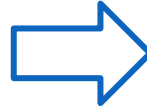
Did we learn, iterate and adapt?

The feedback [from round 1](#) allowed us to make some adjustments....but we are still on this journey



What did we learn in Round 1?

- **Overall people feel this is the right direction**, but some changes are needed in the process and tools.
- **More work to foster a partnership mindset** between the Foundation-Committees-Applicants and better alignment. Empathy, clear and open communication, improved processes and tools.
- There are **regional differences**, in both Committees' and applicants' perceptions.
- Overall Regional Committee members felt autonomous, empowered, satisfied with their role, and worked well as teams.
- The **support and role of the Community Resources** team were seen as very valuable and insights were given to how these could change.



- Some immediate changes in the application format and documentation
- Led to changes in some committee deliberation processes and interactions with applicants
- Focus discussions on some mindset shifts.



Feedback process for round 2



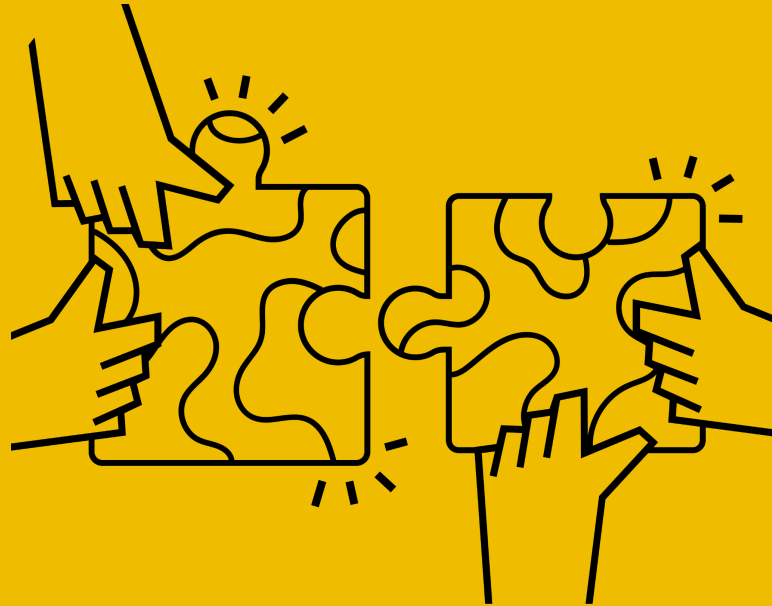
Survey response rate

- **Regional Committees:** Survey response rate after round 1 was 71% and for round 2 it was 67% with regional variation (ESEAP and USCA with 20% response and MEA, SAARC, and LAC with over 80%).
- **General Support applicants:** Survey response rate after round 1 was 48% and for round 2 it was 67%, with higher responses from MEA, LAC, USCA and ESEAP, there were no responses from the CEECA region.
- **Alliances Fund applicants** Survey: 20 responses out of 28: higher response rate in CEECA and USCA (over 80%) and lower in LAc (43%) and ESEAP (60%). Focus group: with 11 out of 28 applicants, in three 1h sessions.

Learning about methodologies used:

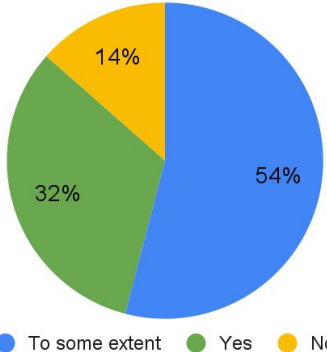
- Participants (both applicants and RFC members) get tired of continual surveys. We should do a follow up shorter one just once a year.
- Language may be a barrier to over more detailed feedback. Harder to get responses in Chinese - focus groups may be a better option
- Those with declined /withdrawn application less likely to respond, so it is good to include them in the focus groups.
- Focus groups discussions allow for more collaborative and deeper reflections. They are a good model with 3 to 4 participants. Not only to focus on process questions, but also dig deeper into perceptions, future ideas/scenarios, and proposals for concrete adjustments.
- Participants value giving feedback in cross-regional participatory sessions.
- Learning from individual PO conversation, as well as conferences and meetups should be more systematically registered as multiple channels of feedback that complement formal processes.

Regional Funds Committees



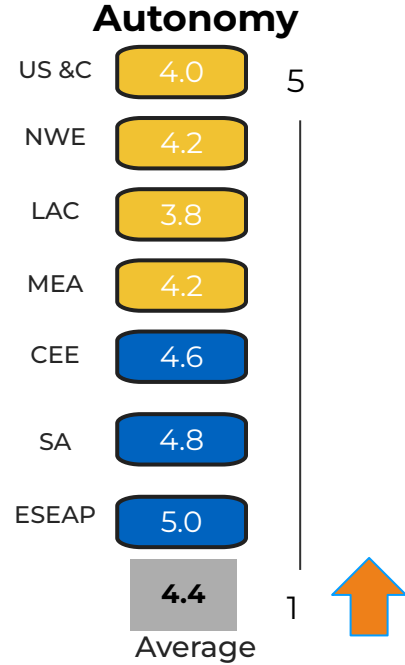
Perception of autonomy and empowerment and capacities

- Still a **high level of empowerment and autonomy** (going from 4.2 in round 1 to 4.4 in round 2 (Scale from 1 to 5) with some regional variation.
- **Things to improve:** timely staff reviews, more complete information about applicant’s history, framework for metric and budget analysis, clarity on budget limitations (particularly for NWE), less rushed timeline during deliberation and feedback stage.



- Committees felt their capacities improved with more experience.
- **But, still call for more formal training** and sharing between committees and communities working on Movement strategy.

Do you feel your capacities improved after round 1?



“As a team, we enjoyed the autonomy of our decision. No one was telling us what to do, rather presenting before us what we can also consider. So this attitude worked.” South Asia

Tools, processes and support

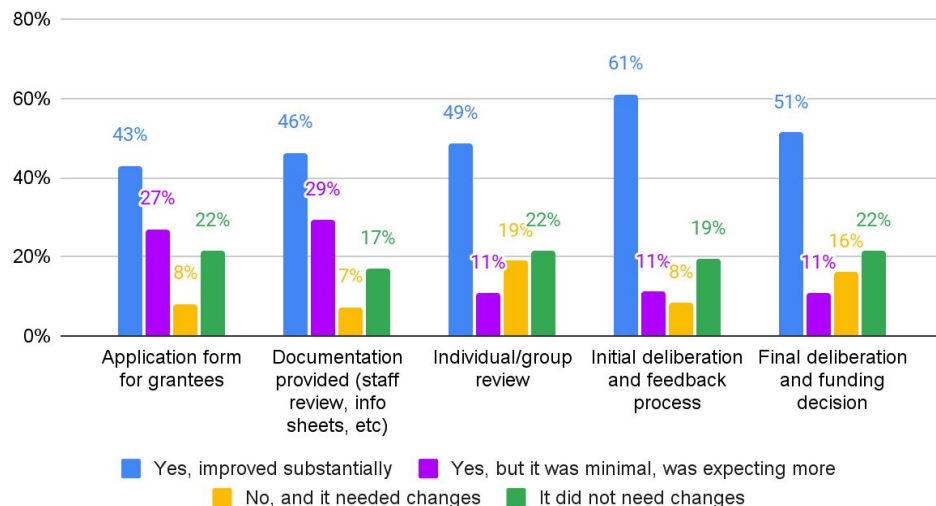
Almost half of members felt there were substantial improvements throughout the process. Regional variations: MEA, SA, CEE and ESEAP more positive, LAC NWE, USCA less so, but also differences within regions. 41% believed proposals had improved.

At least **30%** feel that important changes are still needed:

- Improvements in staff review, further review of application.
- More time for deliberation and feedback (not overlap with holidays)
- More training (particular for strategic analysis)
- **More interaction with grantees**



Regional Fund Committees' perception of the changes after round 1



"In round 1, we were still trying to figure out what to do and how it should be done. In round 2, we were more confident that we knew what we were doing and had a clearer idea about how it could be done." South Asia

Team dynamics and bringing in diversity

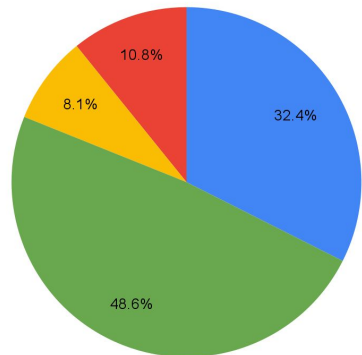
Committees have the agency to proactively determine new committee members and participation criteria

68% believe they should bring in new members (same across all regions). CEE and ESEAP already doing proactive outreach.

Most value the diversity of voices that exist already, and also that it is been open to newcomers.

32% feel that dynamics improved a lot: more mutual understanding, appreciation, more “confidence.

Improvements still needed: better coordination and shared responsibilities, make less confident voices heard, better clarity on behalf of Foundation’s role and support in timely manner.



● Improved a lot since round 1 ● It improved a bit after round 1 ● It was similar to round 1 ● We had more difficulties working as a team

60% prioritise cultural/geographic and linguistic diversity,

34% ethnic and racial diversity

30% management experience within the movement,

27% more experienced editors

21% more thematic expertise

21% believe current or ex board members should be prioritised in this call.

Fewer members prioritise expertise from outside of the movement, but emphasis this importance.

“In certain areas we need to feel more confident and be more decisive in giving a definitive answer or a verdict.” LAC

General satisfaction with the model

The overall positive perception **4.1 out of 5** of the model was maintained, with regional differences some improving their evaluation other reducing.

Positive aspects: being closer to context and communities, being able to openly discuss proposals, “transparency”, openness to newcomers.

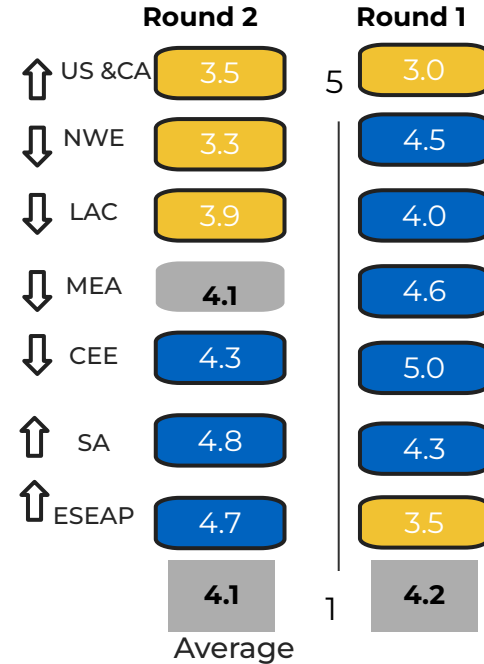
Things to improve: more knowledge about communities, greater participation in “centralised” resource allocation to each region.

51%

felt that Committee Members now had more of a mindset to work with applicants as partner/trust-based relation. However 30% still say they don't quite understand what this means, 13% felt that it had not shifted (mostly LAC region)

40% say they have seen this positive change in relation to applicants mindset. 16% feel that it has not shifted, 37% feel they don't know what this entails.

Does the model enable decentralised decision making
(in yellow those below average, in blue those above.
The arrow indicate increased or decreased perception vs round 1)



The current structure allows committees to air out their thoughts in a free organized manner to reach a consensus in resource allocation. (MEA)

Call for greater integration with Movement Strategy discussions

70% members feel the Regional Committee model is key within these discussion and call for greater involvement and alignment with Movement Strategy discussions, particularly around Hubs and Charter and being more engaged with communities in general

Currently, our committee is not equipped to implement those strategic priorities. We're not looking at the bigger picture because we're forced to consider proposals one-by-one. (USCA)

I believe there is an urgent need for the committee to develop a more panoramic and contextually deepened understanding of the Wikimedia movement. (LAC)

I would not want being part of the Committee to be counterproductive and seen as something distant and inaccessible to the rest of the volunteers and communities. (LAC)



Applicants (General Support)



Tools and support

- As in round 1, most useful tools were 1:1 conversations and having application guides, templates and examples (+**70%** finding these useful)
- There are regions where tools such as videos were not known (**50%** not knowing of these in some regions, particularly MEA and ESEAP).
- Applicants that had conversations with Regional Committee members found it useful, but **40%** did not know this was possible. This was the same in most regions.
- Having unified information available to all new applicants (like a kit) would be useful.
- Fluxx had positive feedback, seeing it as easier with clear guidelines.
- A minority (3) of grantees mentioned they received support from other Foundation staff, and all found this very useful.



The timely help and responses from PO and the Fluxx platform works well for me (MEA)

I found that there is a multiplication of guidelines with a bit different content (which makes it necessary to look at all of them)

68% hear about grant opportunities through communications via the regional program officers, very few from active search on Meta. **52%** felt the application met its objectives, 45% thought it could better do this with minor adjustments.

Overall evaluation about orientation and support

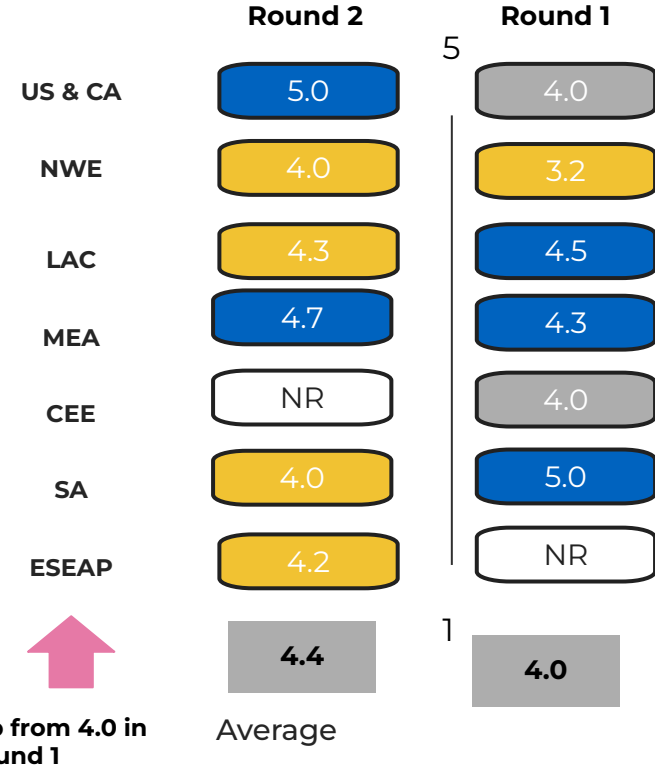
- Despite, applicants not being the same in round 1, it seems the changes helped to better support grantees. People value the availability of PO's and multiple formats for support (email, calls, reminders, etc)
- There are still improvements to be made to make things simpler, particularly for newcomers. Also to better support Learning and Evaluation efforts.
- Interesting to note that **62%** felt they left out something because of fear of not being approved: mostly resources for more staff, training teams and testing new approaches/innovations. Clear budget expectations were requested.

The most useful areas at the moment rely on direct face-to-face communication with people, and the tools are not very useful when you can't talk to them. For example, it is very difficult to search through the guides, which slows down completion time. (ESEAP)

it is very nice to have the chance to discuss with a person. Ii think you are doing a great job in multiplying tools and approaches (texts, videos, guidelines/tutorials, people supporting) but this multiplication tends to be difficult to be managed and updated. (NWE)



How much do you think you were given the right orientation and information to apply to the General Support Fund? 1 being not very much and 5 being very well supported and equipped. (Each round included different applicants)



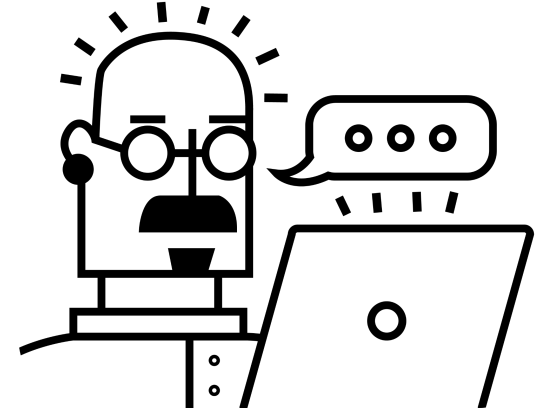
Support they would like to see during implementation:

*It would also be nice to start meeting and collectively learning with everyone at Wikimania again. Wikimania is so important for the **type of deep learning** on these sorts of issues that makes both applying for funds and reporting much easier. In addition to learning more about how to make programs more impactful. (MEA)*

*We would love to know what systems other affiliates and applicants are using to **collect and manage evaluation data** and reporting requirements. Perhaps a quarterly check in with staff would be beneficial also. (ESEAP)*

*More than support, **training** (LAC)*

*I would like to be able to keep abreast of the progress, **successes and failures of other WMF-supported projects**, both within and outside my region, but with thematic affinity. (LAC)*



Perception of committees and their feedback

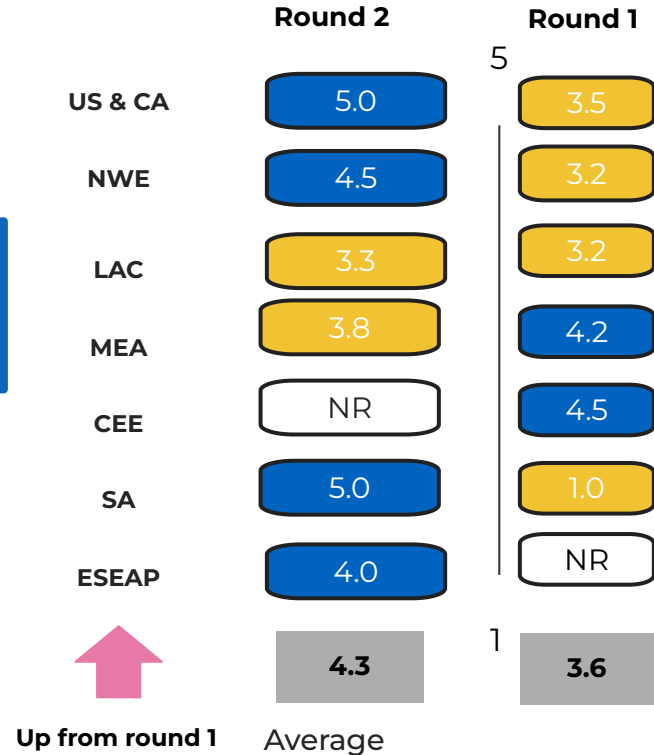
- Applicants in round 2 rated the quality of Committee feedback better, going from 3.5 to 4.3 (average). There were improvements in regions such as NWE and SA.
- However, there is still room for improvement in terms of more interaction.



It is very nice to receive feedback and it is a very good idea to receive this feedback mediated by a staff member of WMF...I appreciated that the feedback included also positive remarks, requests and suggestions (very nice) (NWE)

We were asked some specific questions about our proposal that I spent time considering and answering. None of which adjusted any of the work for the year. We just unpacked more of the information we would have provided via the template had the text not been limited in the first place (ESEAP)

How well did RFC provided a fair, good and useful level of analysis and feedback?



Perception of the model

- **58%** of the applicants stated that the current structure and process enables Regional Funds Committees to contribute to decentralised decision making around resource allocation. Up from 50% last round. 27% said it would with some changes. 3 applicants from MEA and LAC regions said not at all, 1 applicant from ESEAP said they were not sure.
- **52%** believe the model definitely allows for a more trust based relation with the Foundation, 48% feel it is moving in this direction.
- There are different ideas of how the model might work better: committees with more Wikimedia experience, those from outside the movement, bringing in more diverse projects, focusing on strengthening existing ones (particularly those associated with Affiliates)

It seems to me to be a better structure and a friendlier and closer relationship. That is to say, there is the necessary accompaniment of people in a committee that knows the particularities and different contexts that are part of the reality of our continent. (LAC)

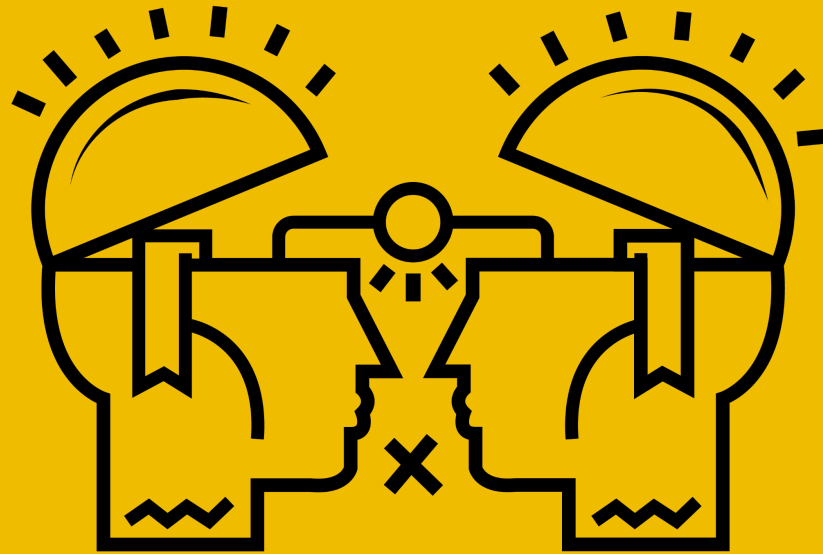
In the future, we can consider more detailed planning of the composition of the committee, balancing different expertise and representation. (ESEAP)

I think in this phase it would be a good idea to open up proposals from many groups and communities around the world to make sure you reach a variety of institutions and you have the chance to see how they work (and if they work); later you should target the best ones (NWE)

I worry that as my affiliate grows in its competency and desired outputs we'll need more money. And I'm now anxious about applying for more (including paying for support staff) as I don't want to see the application or indeed other worthy applications be declined because of lack of ESEAP funds.(ESEAP)



Applicants (Alliances Fund)



This analysis is for the full year of funding 21/22
(both rounds)



Foundation: orientation & support

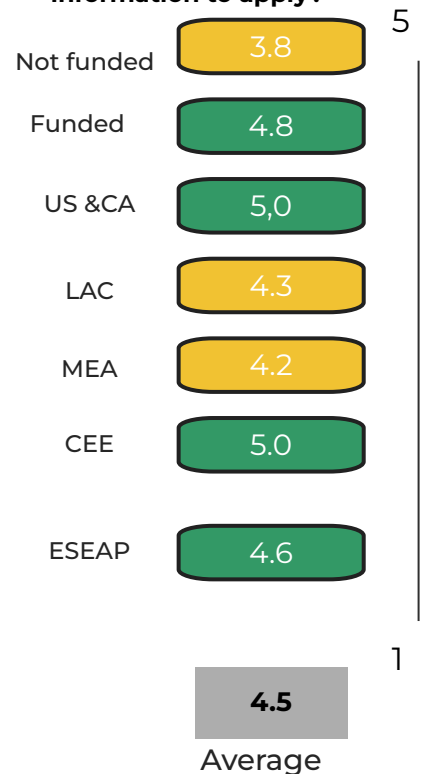
What worked well

- 1:1 meetings and support through mail (79% rated PO support as very good).
- Exchanges based on proposals with specific feedback and support to find solutions.
- In some cases, active support from Wikimedian Communities (i.e Ghana, Taiwan, Indonesia)
- Video tutorial, application guide and help button on fluxx.

Not so well

- Directing applicants to affiliates when they do not offer the support needed (ie. an application in Nigeria that was not funded)
- Not having clear guidelines for some aspects
- Not maintaining the funding timeline
- Limited interaction and feedback (particularly for those not funded)

How much do you think you were given the right orientation and information to apply?



Foundation: orientation & support

Ideas for improvement

- Keep funding timeline
- Guarantee **same support** for all applicants (whilst very positive, 3 applicants said they did not experience it or it needed improvement, particularly those non funded but also some funded ones too)
- **Clearer guidelines** around the type of organisation that can apply and the extent of partnership with Affiliates
- **More discussion with program officers or Committees to adjust applications** (non-funded), clearer idea of budget limits
- Clearer guidelines on the **level of partnership with affiliates**. What is required. Also, recognition of affiliates capacity - scope and moment of growth
- **Feedback from Committees** (both those funded and not felt in some cases it was very brief). Clarity when and where feedback is sent.
- Guide applicants on how long it takes to apply and to register on Fluxx earlier
- Improve language support (20% said it was very good, but 58% said they didn't experience it). Some errors in Spanish translation identified.

Foundation: orientation & support

What worked well

We felt very well accompanied throughout the whole process. The people who intervened were always **very accurate with their corrections** and very willing to answer our questions. (LAC)

The **application process was clear and the Guide helped us a lot when writing the proposal**. The only thing we would like to ask you is to keep the proposed timeline. The final review and decision was supposed to be announced in the beginning of January, but the process lasted until the end of February, so we had to move back the start date of our project. (CEE)

I am very glad that we have the PO - that really help to **support the detailed documents** requirement and quick response (ESEAP)

Not so well

The feedback on our proposal was lacking. There were only a couple of short comments, and there was no opportunity to adjust our proposal. We were also told that we needed to align with our local editor group/affiliates strategy, however at the time of writing the proposal they were also putting their strategy together, so it was strange from our perspective to criticise our proposal for this reason. (ESEAP)

I couldn't get help with my proposal because I good not make necessary connections with local Wikimedia communities. (MEA)

Application + Fluxx portal

What worked well

- Fluxx portal and application (53% said it was very good, 27% that it was good enough, however there were several comments about the length of the application)
- Easy to use: guidelines and support were good

Not so well

- Character limit and differences between template and form (character/word limit)
- Login in fluxx, guidance to do this with time and use email login
- Some difficulties with ID proof, eligibility, fiscal sponsorship (offer more guidelines from the start)
- UX on fluxx not great, difficult for phones

Ideas for improvement

- Adjust character limit and make sure guide/template align with this
- Reduce application form
- Email login
- Make fiscal sponsor question and guidelines clearer
- Ensuring multiple people can be listed and get emails/updates.

*I didn't experience any difficulty in applying on fluxx or understanding why 'Alliance funds'. This may be so because before we applied we sought for help and we **received guidance that assisted us.** (MEA)*

*The questionnaire looks complex at glance. I also think the **process is a bit bureaucratic.** I wish the application process is very simplified. (MEA)*

Agreement with the funding decisions and feedback

- From 1 to 5, on average applications rated the funding decision at 4.0. There was some variation between those funded and not, with those not funded rating it at 3.7.
- Those with a lower rating stated that the feedback had been lacking and expected more to adjust the proposal in time. For them, the reasons why it was rejected was not altogether clear.
- 30% agreed with the funding decision but do not recall having seen detailed feedback (ESEAP, MEA).
- The majority found the feedback useful to “push them in the right direction” and valued the level of support and “mutual understanding”.

Relationship with affiliates

What worked well

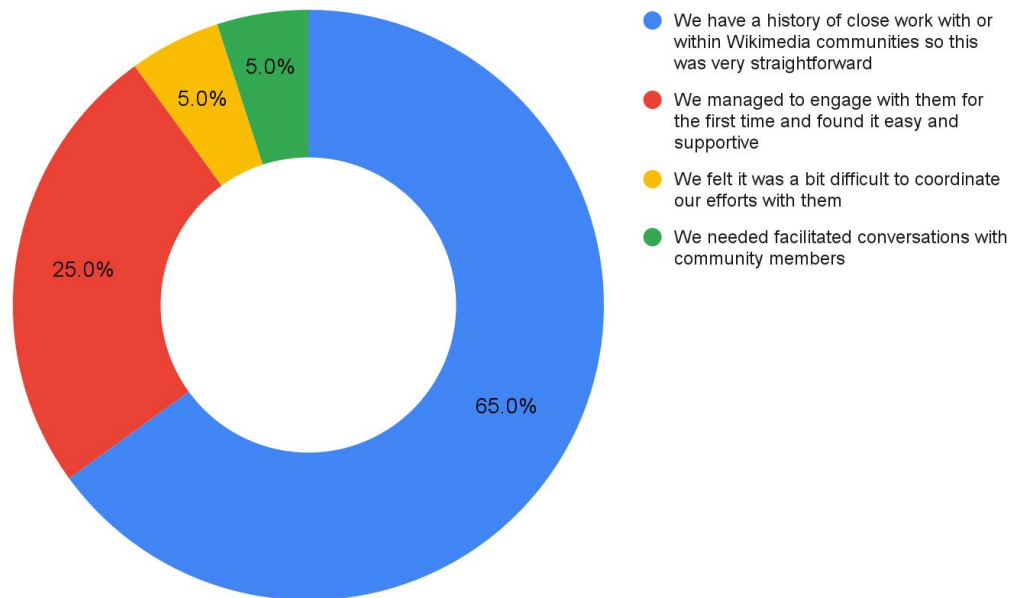
- Foundation promoting these connections to insure that the proposal adds value to work already being developed
- Very close relation (Armenia - ex staff, Indonesia, Argentina)

Ideas for improvement

- Find ways to support new organisations without established relations.
- POs better supporting connections with affiliates in the Region and other WMF staff.
- *Joint funding applications Communities-Allies (MEA)*

Not so well

- Sending applicants to talk to affiliates that may not have the time or interest
- Affiliates may not have presence in geographical areas the alliances applicant is in.



Relationship with affiliates

What worked well

*The **WMF made us to understand the importance of working with the Wikimedia communities** within the context of Alliance Funds as this will help ensure that the project doesn't lose focus of the mission of WMF and how well it agrees with the objectives of my organisation. (MEA)*

Ideas for improvement

*Perhaps the organisation could contact people applying with Wikimedia communities in their region. There is the particularity that in Periódicas we already knew and collaborated with the closest Wiki community, but I understand that **not all organisations have that link** (LAC).*

Is there anything you didn't include because you felt it would not be approved or risky?

Yes: 32% (6)

- Longer lifetime *“even after participants go through a course, they still need to 'have their hands held' for awhile and experiment with Wikidata in libraries, this can not be done in a year”*. (MEA)
- Administrative costs (MEA - not funded)
- More participants, face-to-face activities because of ongoing pandemic
- Blockchain & Cryptography (MEA)
- Strategies to include people with disabilities (ESEAP)
- *“Maybe it was too ambitious and we should have scaled it down”* (ESEAP - not funded)

No: 53 % (10)

- *“Project changed but improvements were for the better”* (LAC)
- Best to address *“the fundamental”* in a first project (ESEAP)
- No, it is close to the OER mission (ESEAP)

No comment/response: 15% (3)

Support needed during the grant

- Regular check-ins with our internal WMF advisers (every two months). Could also be via email (MEA)
- Localised support (MEA)
- Better comms support (alignment/editorial plan to fit into) and troubleshooting support in case of difficulty with Wiki communities post-event responsibilities. (MEA)
- Frequent communication to share expertise and recommendations (LAC)
- Direct feedback from the Foundation during implementation (USCA)
- Any support resolving administrative/ financial compliance issues (ESEAP)

Any changes they would make to the fund?

Positive aspects:

- Flexible
- Funding for open knowledge movement is limited in different contexts, this is a unique opportunity (Taiwan, Indonesia)
- Allows them to “work with independence”
- Wikimedia Community support will be key

Things to look at:

- Longer time frames + view of sustainability (continuation)
- Support for communities not already engaged with Wikimedia (“they might find it daunting”)
- Recognition/communicate the value added
- Flexibility on maximum amount (MEA)
- *“Integrating our different means and formats of knowledge into the project could be worthwhile”* (MEA)
- “Trying to bring these programmes to smaller communities or communities far from the big cities is ambitious but necessary” (LAC)
- Engagement of affiliates with the implementation (ESEAP)
- Sustaining an open-mind to emerging technologies for culture & localization (MEA)

How to reach more (less connected) organisations?

5

Note: 12 respondents **(75%) said they heard from Wikimedian communities**, 3 (19%) through Foundation posts on social media, and 1 (6%) through meta.

- Open and on other platforms so that more could apply (not only Meta)
- **Social media is key.**
- Emphasise that it is a process that is supported, that you can apply in your own language. Guarantee more language access in general info about the Fund.
- Show merit of the Fund with cases.
- Work closely with organizations who have already applied for the Alliances Fund to increase the engagement through them.
- “Go beyond Wikimedia communities”. Expand to communities of academics and industry who rely on open knowledge platforms
- Small grant to mentor newcomer organisations (ESEAP)

*Communication with the non-wiki world seems to be the **Achilles heel**; those interested in the Wikiverse, but not on Telegram or not setup on talk pages (or not familiar with Meta) have no idea where or how to stay informed. Then, **all the energy it took to get these people interested and inspired is lost** when they disperse, and there's no way to communicate with them easily (MEA)*

*I think it's more about getting the message out there about the grants. I just **happened to find out** about them as a result of an impromptu discussion with a work colleague (ESEAP)*

Where they see they are creating value:

1. Awareness about open knowledge in key sectors (GLAM/education/journalism, legal aspects)

2. Quality contents - "open valuable resources/reliable content" focus on the value of the contributions - *how they can be used* (Wikidata/Commons)

3. Innovate in approaches/ technology (ie. Armenia with graphics, Open Street Map)

4. Capacity-building + bring in new contributors, create training resources and methods (for institutions, youth, general participants. Concern about retention)

5. Improve and expand established work with Wikimedia communities



Contact me
jstephenson@wikimedia.org