

Evaluation Report: Stewards Visit 2015

Support & Safety



Overview

In the spring of 2015 the Wikimedia Foundation's Support & Safety team invited the Stewards group to visit their office in San Francisco. Following several months of planning and coordinating between the Foundation and the Stewards, the visit materialised between 21-23 October 2015.

This report presents the feedback received in its entirety as a means to facilitate decisions that will support the Stewards and the Foundation in developing the proposals into action plans. It includes a list of action items with a preliminary set of next steps. The prioritization of the actions items is merely a suggestion and open to restructuring, should further feedback be received or should major blocks emerge.

Trivia: Out of the 37 Stewards invited, 15 were able to make the trip, coming from: Australia, Belgium, Brazil, Canada, Denmark, Germany, India, Italy, Netherlands, Russia, Spain, Sweden and the United States.



The visit was coordinated as an effort to:

- establish new relationships between the Wikimedia Foundation and the Stewards group
- maintain existing relationships between the Wikimedia Foundation and the Stewards group
- encourage new connections and relationships between the Stewards themselves (many of which have never met another Steward)
- encourage increased trust and self governance for the Steward group following the meetings
- bridge the communication gap between the Wikimedia Foundation and the Stewards' group as well as the communities.



Methodology

Feedback has been collected from the Stewards through multiple means. Those include notes and requests placed via email, feedback provided through in-person conversations as well as feedback provided through a post-visit questionnaire.

The list of questions included in the questionnaire that was made available to the Stewards who attended the visit can be found [here](#). The results are recorded [here](#). Response data extraction can be found [here](#).

Even though most questions included a list of set responses to select from or vote on, it was possible to submit additional responses through the “other” option.



General feedback about the visit

Q. To what extent do you agree or disagree with the following statements about the Stewards' visit ?



All Stewards agreed that "all or most of their concerns were addressed" during the visit



All Stewards agreed that the visit "has been a valuable experience that they would like to see repeated"



All Stewards disagreed with the statement: "It did not make a big difference for me"

It has helped me establish communication channels to various WMF departments



It has improved my access to developers & tech help



It helped me better understand the Foundations abilities and limitations



It has improved the Stewards group's working dynamic



It has allowed me to better understand challenges the other Stewards face



It has helped address issues and discuss ideas that were otherwise stalled

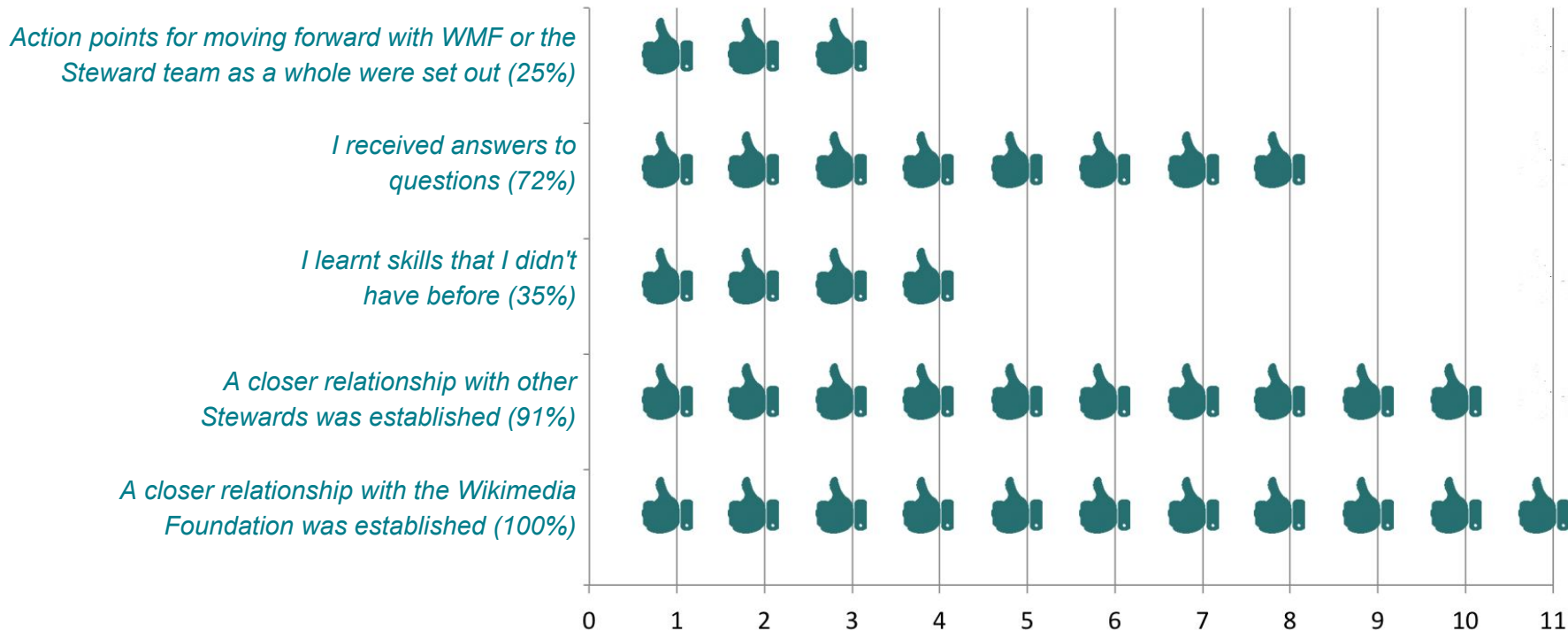


Strongly agree
 Agree
 Neither agree or disagree
 Disagree
 Strongly disagree

General feedback about the visit

Q. Which of the following goals do you feel were reached during your visit ?

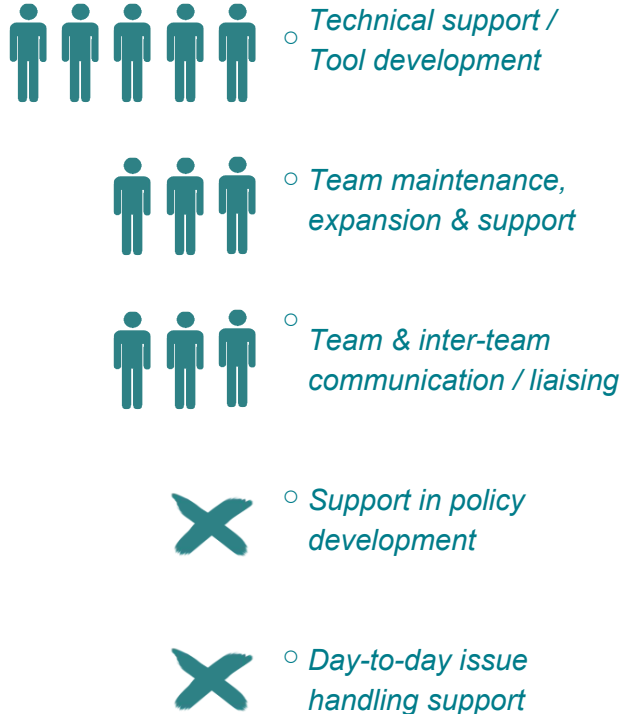
chart indicates the number of votes each statement received out of the 11 stewards voting (multiple statements could be voted)



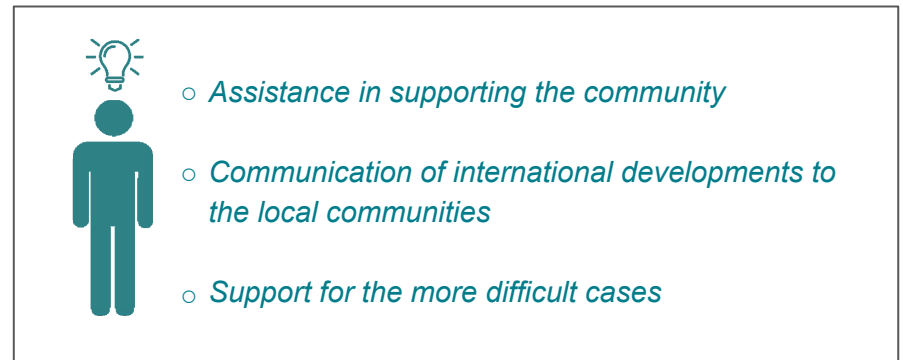
Priority areas for the stewards

Q. Which of the following areas do you consider to be a top priority for you ?

chart indicates which statement received the majority of the 11 stewards voting (only one statement could be voted)



Out of the five main areas of focus identified by the Wikimedia Foundation, no desire for assistance was expressed regarding day-to-day handling of issues or policy development. Technical support & tool development though appears to be the area in need of most attention. It has been a comment often expressed that tools require updating, modernization, expansion and better level of maintenance. Three additional areas were identified where support was requested:



- *Assistance in supporting the community*
- *Communication of international developments to the local communities*
- *Support for the more difficult cases*

Q. Rate the importance of the following action items

The stewards have provided feedback and expressed requests during the in-person visit, as well as through other communication channels (email, IRC, etc.) prior to the visit.

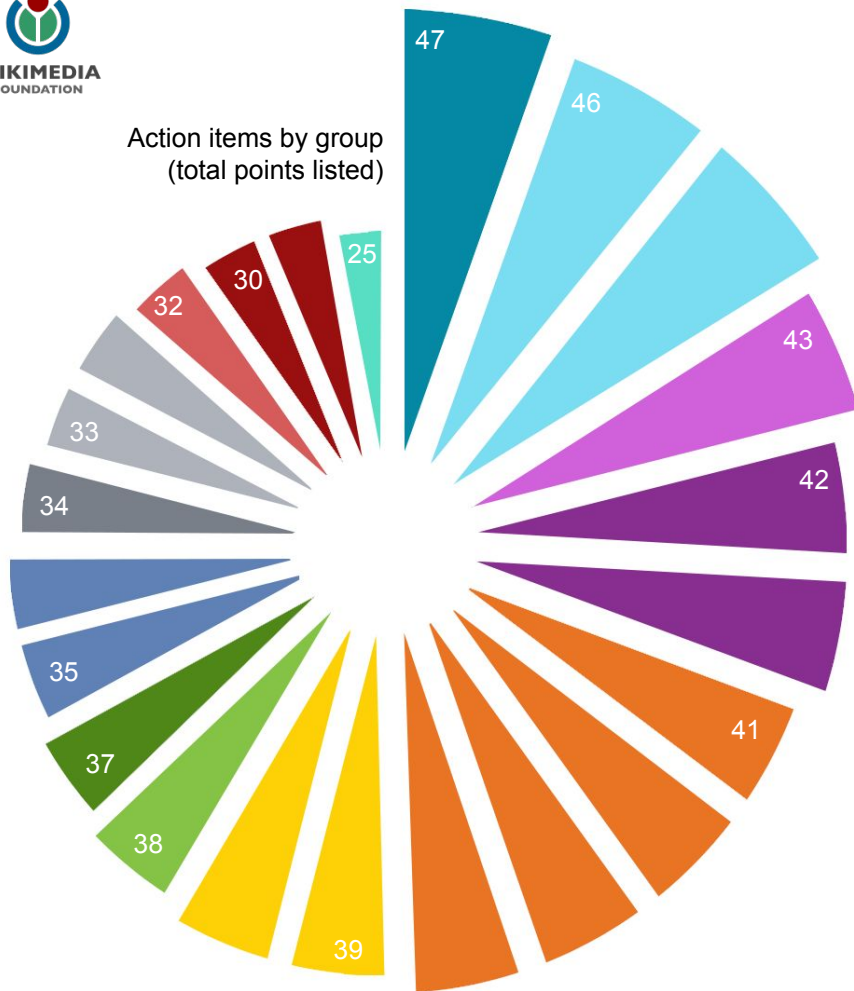
Those were used to form a list of 23 action items capturing the requests of the entire group of stewards rather than the specific individuals who visited the office. They were requested to rate those action items, ranging from extremely important down to not important, as an equivalent to a 5-point rating system. (*image example in this page*)

The final rating of each statement is based on the number of 'votes' it received for each importance statement. Based on the grand total of points each action item accumulated they have been divided into 14 groups for the purposes of descending prioritisation. (*see graph in the next page*)

An additional action point was submitted which was to: "Enable stewards to attach local accounts to global ones". This has not been added to the priority list at this stage, due to lack of points' sum. It can, however, be considered in the future.

extremely important
very important
fairly important
somewhat important
not important

Action items by group
(total points listed)



Prioritisation of action items

1. Global CheckUser & Global CheckUser log
2. GlobalUserMerge completion
3. Enable automatic proxy checks
4. Modernisation of design & workflow of Admin/Steward tools
5. Ability for global lock/multi lock through CU
6. A new global block tool instead of global lock
7. Match options for IPv6 blocks with the options for IPv6 checkuser
8. Abuse filter re-write
9. Steward communication channel (mailing list, IRC, etc)
10. Regular Webex meetings between WMF & Stewards
11. GlobalEcho notifications
12. Email abuse reporting
13. Stewards involvement in user right confirmation & approval process
14. Global ArbCom / Dispute resolution
15. Meet-the-Stewards part of onboarding process for new staff
16. Resources & training options in handling problematic contributors available for Stewards or small-wiki admins.
17. Outgoing OTRS queue (ISP Contact)
18. HRWiki case support
19. OAuth training
20. Establish product ownership of the Admin/Steward/Functionary tools
21. OAuth Rights review
22. Restoration/Re-importation of old CU logs
23. Access to list of (sugar, etc.) case numbers

Timeframes for action items

Timeframe 1: one week

items that can either be completed or work for the next phase can commence within the course of 1 week

- Modernisation of design & workflow of Admin/Steward tools
- Ensure that the options for IPv6 blocks match the options for IPv6 checkuser
- Steward communication channel (mailing list, IRC, etc)
- Regular Webex meetings between WMF & Stewards

Timeframe 2: one month

items that can either be completed or work for the next phase can commence within the course of 1 month

- Global CheckUser & Global CheckUser log
- GlobalUserMerge completion
- Enable automatic proxy checks
- Ability for global lock/multi lock through CU
- A new global block tool instead of global lock
- GlobalEcho notifications
- Stewards involvement in user right confirmation & approval process
- Outgoing OTRS queue (ISP Contact)
- Establish product ownership of the Admin/Steward/Functionary tools
- Access to list of (sugar, etc.) case numbers

Timeframe 3: several months or longer

items that require extensive work and consultation with multiple teams and / or the community

- Abuse filter re-write
- Email abuse reporting
- Global ArbCom / Dispute resolution
- Meet-the-Stewards part of onboarding process for new staff
- Resources & training options in handling problematic contributors available for Stewards or small-wiki admins
- HRWiki case support
- Restoration/Re-importation of old CU logs

Next steps item-by-item

1. Global CheckUser & Global CheckUser log

S&S to set up a meeting with Tech / Engineering (possible people to include: Danny, Roan, Kaldari) to discuss timelines, scheduling, help push this as a project overall and figure out who should own it. If unsuccessful, S&S to start campaigning for resources.

2. GlobalUserMerge completion

S&S to use Tech / Engineering meeting to discuss timelines, scheduling, ownership and resourcing options. First meeting within a month - more meetings to follow.

3. Enable automatic proxy checks

S&S to discuss with Chris Steipp to begin discussing options. Known to be difficult issues with the options most often brought up being legally/technically problematic. First meeting within a month - further meetings to follow.

4. Modernisation of design & workflow of Admin/Steward tools

Abby wants to review how Stewards use their tools, assess the situation, have them screencast and share their workflows and understand what they do. S&S to continue to oversee the process and assist as and when required.

5. Ability for global lock/multi lock through CU

S&S to set up a meeting with Tech / Engineering to discuss timelines, scheduling, help push this as a project overall and figure out who should own it. If that fails, CA to start campaigning for resources.

6. A new global block tool instead of global lock

S&S to use Tech / Engineering meeting to discuss timelines, scheduling, ownership and resourcing options. First meeting within a month - further meetings to follow.

7. Ensure that the options for IPv6 blocks match the options for IPv6 checkuser

S&S to locate the phabricator ticket and commence work.

8. Abuse filter re-write

This is a complex project that requires multi-team coordination.

9. Staff / Steward communication channel (mailing list, IRC, etc)

To be actioned by S&S / James Alexander.

Next steps item-by-item

10. Regular Webex meetings between WMF & Stewards

S&S to set up a for the Stewards.

11. GlobalEcho notifications

Tech is already partially working on it. Belongs to James Forrester's department. Details and progress to be discussed during same meeting with Tech, set up for items 1 & 5.

12. Email abuse reporting

Further discussions to be held to clarify specifics.

13. Global ArbCom / Dispute resolution

This item requires longer discussion with the Stewards. It is complex on the social side - conversations need to happen internally as well as externally. This should be part of a major consultation which could be useful, but could mean significant change in (community) policy. Needs in depth analysis before work can commence.

14. Stewards involvement in user right confirmation & approval process

The stewards are already working on this on stewards wiki. S&S to ensure that WMF engineering managers are onboard (Greg Grossmeier) and in agreement. S&S to follow up with stewards on progress on their policy and set up a meeting with Greg to ensure he's ok with that.

15. Meet-the-Stewards part of onboarding process for new staff

S&S to ensure there are a couple of people the stewards can turn to if James is AWOL. Ensure this transition happens ... before there is a transition.

16. Resources & training options in handling problematic contributors available for Stewards or small-wiki admins

S&S to explore the possibility of offering training, recognizing that the later is easier than the former. This is a large project with multiple moving parts.

17. Outgoing OTRS queue (ISP Contact)

S&S to talk to OTRS admins.

Next steps item-by-item

18. HRWiki case support

This is a complex project. Larger conversation needs to happen to review options with legal, comms & S&S, possibly CR too. Consider option of de-sysoping everybody for a year. Review timeframe for staffing that this project. S&S to hold meeting with Legal, etc. within a month to get the ball rolling.

19. OAuth training

Chris Steipp has agreed to continue to work with Stewards so that they have access to it on an as-needed basis. *Timeframe: TBD*

20. Establish product ownership of the Admin/Steward/Functionary tools (who's the PM/CL)

S&S to have a larger discussion as part of the tech meeting. It's pivotal to ability to resolve many other of the item on the action list. Even though it is relatively low in the Stewards' priorities list, it really needs be resolved in the relative beginning before resources can be allocated.

21. OAuth Rights review

This falls mostly on the stewards at this point, as they already started drafting relevant policy and Chris Steipp has started to work with them on it already. S&S will remain available to assist as needed. *Timeframe: TBD*

22. Restoration/Re-importation of old CU logs

S&S to find the Phabricator ticket opened for this request, figure out what the real blocker is and resuscitate activity on it. It has been stalled for far too long.

23. Access to list of (sugar, etc.) case numbers

S&S to collate this information and add it on Stewards wiki.

Thoughts, feedback & requests

"Follow up with staff Stewards spoke with"

"Maintain communication with Stewards on Steward-related topics"

"... it's crucial that the WMF simply support the stewards. After all, if you establish a good relationship with the stewards, it's likely that you create more goodwill from the global community as well. Listen to everyone and try to address their concerns."



"Disappointed at the lack of informal Community discussion with Legal prior to launching new Confidentiality Agreement"

"Communicate with the community"

"Continue the work that was discussed during the meeting"

"Continue to make Mediawiki user-friendly"



"I found the training + discussion sessions helpful"

"Establish Stewards tools ownership"

"Resolve bug requests"

"... it helped me establish communication channels with specific people. When they know who you are in real life, they tend to respect you more and tend to listen to you more then when they don't."



A few comments from the S&S team

"Repeat stewards meeting"

The request for a stewards meeting to be repeated will be considered by the S&S team, given the value added to the relationships through the in-person interaction. Organising an out-of-the-WMF-office meeting may require higher hands-on participation by the stewards, and may shift its focus on the stewards spending time with each other rather than with WMF staff. Further discussion to be had with the stewards on a preferred location that will maximize attendance and coordinate further. S&S to review available budget for next fiscal year.

"Create realistic programme for tools completion, promised years ago"

S&S is setting up a meeting with Engineering / Tech to discuss options for the Steward requests. Limited resources and/or ownership questions for many of their tools mean it is unlikely it will all happen within what is viewed as a reasonable amount of time, but we can use the data gathered to push for additional resources and prioritize work.

"Share top actions with Stewards so they can adjust their priorities list accordingly"

S&S is happy to start this process by producing and sharing this report. The items' priority status can be adjusted as new action items are identified, or major blocks emerge. It needs to be mentioned that not all items can be actioned, and even when they can it is not possible that this is done at the same time for all.

"Establish mechanism for dealing with problematic projects, who are currently orphans"

It is acknowledged that even though problematic users can be escalated to the Foundation for a global ban, no equivalent mechanism exists for entire projects.

"Communication with the stewards + the community"

It is acknowledged that there is room for improvement of the communication between the Foundation and the community. We will continue to communicate with the stewards, subject to time or legal restrictions.

Overall, the visit was considered to be very valuable by and to the Stewards as well as the Foundation as:

- it was unanimously agreed that it helped establish new relationships between the WMF and the Stewards group as well as nurture existing ones
- it allowed the Stewards to meet each other in person in a coordinated manner for the first time which, they agreed, helped them to strengthen the relationships amongst them and improve their own working dynamic
- it allowed the Stewards to liaise directly with key WMF staff who are able to assist them in resolving specific issues and pain points
- it enabled the WMF and the Stewards group to listen to each other and collaboratively set short term and long term action points along with a realistic schedule

