

Quarterly review

COMMUNITY ENGAGEMENT

Q1 - 2016/17

Approximate team size during this quarter: 40

Q1 - CE Department

Objective: Clarity around process and structure



Objective	Measure of success	Status
<p>Goal 1. Cleanup community-related documentation on Office wiki</p> <p>Lead: SuSa</p>	<ul style="list-style-type: none">• Document structure of CE• Cleanup CE pages to make resources more locatable• Update "how tos" template and pages linked therefrom	<p>Team and department pages at Meta and Office wiki were revised and updated.</p> <p>There is now a renewed "Resource Hub for Working with the Communities" on Office wiki: the contents in this resource were revised and updated; resources relevant to WMF and developed by CE teams were chosen among dozens pages and are now highlighted on the teams' pages; the related navigation template has a new design; a new category contains the main pages in the Hub.</p>

Learning:

- It is important to gather wider department and organization input before proceeding with similar initiatives, to make sure the outcome is tailored to specific needs.
- Having a firm plan in place before the quarter starts is also recommended.
- Having a solid and coherent category tree is hard.

Q1 - CE Department

Objective: Development and internal testing of the Wikimedia Resource Center



Objective	Measure of success	Status
<p>Goal 2. Initiate development of the Wikimedia Resource Center (Annual Plan - CE - Program 3)</p> <p>Lead:L&E</p>	<ul style="list-style-type: none">• Pilot and test central landing page and internal pages, navigation and contact structure.• Implement Guided Tour extension• Collect feedback from internal teams on interactions with communities and re-assess WRC design and content.	<p>Pilot testing and feedback targets complete. central landing page has been tested internally and revised based on feedback.</p> <p>Guided Tours extension has been designed but will not be implemented until late October.</p>

Learning:

After the first feedback cycle involving peer review of the prototype by the cross-team design group, we have learned that there is work to be done in terms of shared standards for information architecture. This includes the ways each team organizes their community facing portals and what interactions they expect from the shared space. We have also identified additional resources for integration into the FAQ and calendar sections. We are outlining these as upcoming workflows to follow up on after release of alpha version in December 2016.

Q1 - CE Department

Objective: Support for Scoping & Prioritizing Programs Tool Needs



Objective	Measure of success	Status
<p>Goal 3. Create system with community tech for prioritizing and supporting development of Program Tools (Annual Plan - CE - Program 3)</p> <p>Lead:L&E</p>	<ul style="list-style-type: none">• Develop system to prioritize and develop program tech needs with Community Tech• Prioritize, coordinate the creation of use cases for, and support the development of key program tech tools.	<p>Complete.</p> <p>System for input and prioritization is in place for both program as well as non-program needs for Community Engagement technical projects.</p> <p>Program & events dashboard has launched and was presented at a session at WikiConference NorthAmerica</p>

Learning:

The [Programs & Events Dashboard](#) app to help organizers manage and track their programs and events launched in a beta version at the beginning of October. The launch is targeting existing organizers, especially in non-English and non-Wikipedia programs, and expects between 20 to 50 beta organizers and 100 to 800 participants to engage with the app. Thank you to Community Tech team for their support to moving the dashboard forward.

Quarterly review

TECHNICAL COLLABORATION

Q1 - 2016/17

Approximate team size during this quarter: 10 FTE (9 FT, 2 PT)

Key performance indicators:

<u>Number of major discussions that the team supported</u>	Q1 2016 – 27 discussions Q4 2015 – 30 discussions
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Q1 - Technical Collaboration

Objective	Measure of success	Status
Technical Collaboration Guideline on project information (Annual Plan - CE - Program 7 - Goal 2)	Recommendations for announcing new project proposals Recommendations for projects requesting prioritization or resources Recommendations for publishing project updates	The draft recommendations were published in the Technical Collaboration Guideline sections " Prioritization list " and " Milestone communication ", after interviews with product managers and a team review.

Learnings

- We decided to avoid rigid rules (i.e. a common template for all projects) and instead offer recommendations with their reasoning.
- So far we are keeping the recommendations general and brief. More specific guidelines might emerge in the future based on need, probably as appendices to the TCG or related HowTos.
- The Prioritization list task went through an internal crisis due to disparity of opinions, which was solved thanks to the recycling of a similar exercise that Community Liaisons had made a year before in their offsite. Saved by good team discussions and good note-taking!

Q1 - Technical Collaboration

Objective: CL support to Product



Objective	Measure of success	Status
Work with communities to learn how inter-wiki search might work (Annual Plan - CE - Program 7 - Goal 1)	Call for feedback sent to targeted communities. Volunteers contribute ideas, get involved, and help improving the plan. Based on the experience, feedback for the Technical Collaboration Guideline is provided.	All tasks completed, and now the Discovery team is proceeding with the plan.

Learning

- This task was selected as a team goal because we wanted to test our earliest Technical Collaboration Guideline drafts. The feature itself wasn't expected to be problematic.
- The Discovery team followed our recommendations. Community participation was positive, although we would have wanted more voices -- and we discussed why we didn't get them.
- Chris Koerner wrote [a reflection](#) of this goal with the TCG in mind, a reality check that will be used during the upcoming review of the TCG.

Q1 - Technical Collaboration

Objective: Community Wishlist



Objective	Measure of success	Status
<u>Hire a Developer Advocate for the Technical Collaboration team (Annual Plan - CE - Program 8)</u>	Publish a Developer Advocate job opening consistent with our annual plan. Promote the job opening to audiences consistent with TC and WMF strategy. Process candidates, select one, and send them a job offer.	The plan was completed and, after a selection process through dozens of candidates, our new Developer Advocate was hired.

Learning

- We put an extra effort in promoting the position beyond the usual channels and audiences. Outreachy and FLOSS Asia helped us promoting the job post in their social media, and we got some good candidates from their communities as a result.
- Sarah Roth was a great Recruiting partner bringing speed, common sense and practical experience.
- Andre Klapper, Rachel Farrand, and Niharika Kohli supported Quim Gil forming a panel with complementary backgrounds and attitudes, which made the final decision simpler and solid.
- Erica Litrenta helped reviewing the job opening, promoting it, and preparing the landing for our new colleague.

Q1 - Technical Collaboration

Other successes and misses

- Benoît Evellin organized successfully the Flow satisfaction survey, promoting it to 14 wiki using Flow and obtaining 583 answers recorded ([T125632](#)).
- Rachel Farrand drove the confirmation of location and dates for the Wikimedia Developer Summit, and also opened the registration for the event ([T132398](#), [T141927](#))
- Nick Wilson reviewed the entire 2015 Community Wishlist Survey results and selected 15 tasks still open and appropriate for volunteer developers ([T130095](#)).
- Andre Klapper culminated a year of improvements to code review awareness, process, and documentation, and handled the torch to Technology (Greg Grossmeier) ([T129067](#)).
- Moushira Elamrawy supported successfully two Reading deployments: Wikidata descriptions in mobile web ([T141354](#)), new location of Language button on mobile web ([T139793](#)),
- Sherry Snyder supported the Operations team by announcing the end of non-secure HTTP access to Wikimedia APIs among bot developers ([T136674](#)).
- Johan Jönsson updated [Meta:Babyon](#), "the Wikimedia translators' portal/noticeboard", which hadn't been touched since 2010, adding [a new page for non-Wikimedia translators](#) ([T131580](#))

- The "Save page" button was split to "Save page" (for creating new pages) and "Save changes" (for changing existing pages). The plan to change "Save" to "Publish" is stalled on other teams due to new requirements introduced in the last minute.
- Moushira Elamrawy and Volker Eckl kept struggling cleaning the Design resources in mediawiki.org and exploring a process for UX discussion with volunteers. It seems that the Foundation designers need to clarify their priorities first. T121647
- Erica Litrenta and others put significant effort into participating in internal discussions about the relationship between Product and Community Liaisons. There was initial progress listing problems, but we didn't get far discussing solutions. To be continued. T135819

A complete list of resolved tasks can be found at

<https://phabricator.wikimedia.org/maniphest/query/ZD1.US0loBCb/#R>

Q1 - Technical Collaboration

Category	Workflow	Comments	Type
Planning	Plan community engagement processes within Product teams	Team members meet with the following teams: VisualEditor, Collaboration, Language, Community Tech, Discovery, Reading. They regularly brought feedback from communities and discussed engagement strategies.	M
Outreach	Creating newsletters and other outbound communication to communities	<ul style="list-style-type: none"> ● <u>Tech/News</u> (weekly) has 555 individual (+9%) and 75 Community page <u>subscriptions</u>. It is being translated to 15–20 languages. ● <u>VisualEditor Newsletter</u> (now quarterly); the multilingual version for June was delivered in early July to <u>127 individuals</u> (+7) and to <u>462 community pages</u> (+14). It was translated into <u>23 languages</u> (+1) and translations reached 83% completion (+6%). ● The Collaboration team newsletter about Flow, Notifications and ERI has been designed and the first issue will be released on Q2. 	M
	Facilitating public meetings around product development	<ul style="list-style-type: none"> ● 3 workshops at WikiConference FR. ● 1 workshop at WikiCon DE. 	M

Q1 - Technical Collaboration

Category	Workflow	Comments	Type
Feedback	Turning user feedback into Phabricator tickets and actionable tasks	149 tasks created in Phabricator (125 open / resolved / stalled, 24 duplicate / invalid / declined). https://phabricator.wikimedia.org/maniphest/query/n5cTrOAPcNvg/	R
	Engaging users in surveys	<ul style="list-style-type: none">• <u>Flow user satisfaction survey</u> (survey completed, analysis ongoing)	R
Conduct	Responding to reports received about conduct	9 incidents handled, related to <ul style="list-style-type: none">• Phabricator Etiquette• Harming the discussion or community with methods such as sustained disruption, interruption, or blocking of community collaboration (i.e. trolling).	R

Q1 - Technical Collaboration

Category	Workflow	Comments	Type
Bugwrangler	Review of new tasks and unusual activity in Phabricator	Keeping it at 50% dedication from Andre Klapper.	R
Events	Tech Talks	None	M
	Offsites	<ul style="list-style-type: none">• Operations team• Planning for the Release Engineering offsite We agreed with the Administration team that we will stop our support to new Wikimedia Foundation offsites, which was kept for historical reasons.	R
Community metrics	Monthly KPIs and Korma dashboard	Focus on migrating to the new dashboard based on Kibana, for better maintenance and possibilities of customization (T132323).	M

Type: new, reactive, maintenance

Quarterly review

Support and Safety

Q1 - 2016/2017

Approximate team size during this quarter: 6.5

Key performance indicators

SLA for Trust & Safety correspondence: Resolving 95% of emergency@ within three hours	44 legitimate quarterly “emergency” contacts (100% resolved in time)	+ 1.5% QoQ	43 unique threats of harm; 9 fit criteria for escalation to FBI. 79.5% resolved within 30 minutes.
SLA for public correspondence: Responding to 95% of answers@ and business@ within two business days	Apr. 207 quarterly contacts (97.2% responded to in time)	- 3% QoQ	75% of correspondence to answers@; 25% to business@



Objective	Measure of success	Status
Goal 1. Research and plan training modules delivery method/platform (Annual Plan - CE - Program 2)	<ul style="list-style-type: none">• Prepare a consultation with functionaries, other community members, academics, organizers (editathon organizers, GLAM partners, etc.) and industry experts to help SuSa decide delivery choice of the training module platform.• Have completed in-depth feedback from 30 consultees	<ul style="list-style-type: none">• Completed and deployed on schedule.• 120 responses received, including in-depth replies from 63 consultees.• See Slides for full results

Learning

As always, designing and deploying a multi-language survey is time- and labour-intensive. The surveys were open for three weeks in August after being mailed out to targeted groups, both within the community (including ArbCom members, stewards, checkusers, event organizers, and other functionaries, and outside in the academic and web platform industries. We received substantive replies from more than half (63) of the total number who viewed the surveys, and were able to glean very helpful direction on both design and content issues.

Q1 - Support & Safety

Objective: Project Framework



Objective	Measure of success	Status
Goal 2. Research and plan modules content for two modules: harassment and event banning (Annual Plan - CE - Program 2)	<ul style="list-style-type: none">• Consult above groups to advise on the content for the event ban module.• Consult above groups to advise on the content of the harassment module.• Have completed in-depth feedback from 20 consultees	<ul style="list-style-type: none">• Key areas of concern identified• Prioritization provided through rankings (e.g. techniques)• 32 people detailed challenges they face in dealing with harassment reports

Learning

Community members have strong opinions on the areas around harassment in which training would be beneficial - these include investigations, support for victims, procedures at events, communication of report results to wider community, defining harassment, and de-escalation techniques. Overall, support and desire for training was high, and on-wiki deployment of training materials was preferred. Text-based training, with strong emphasis on realistic scenarios as learning tools, was a top design request. Results were posted to Meta in both long and summary form in late September.



Objective	Measure of success	Status
Goal 3. Follow-up surveys on satisfaction with SuSa support (Annual Plan - CE - Program 10)	<ul style="list-style-type: none">● Survey designed for staff “customers”● Create and schedule surveys for functionary groups with which SuSa interacts	<ul style="list-style-type: none">● Staff survey designed and sent. <u>29 staff responses across seven Foundation departments</u>. Results very positive: All categories 4.6/5 or higher. Key area of improvement suggested: Response time on large, cross-team projects.● Functionary surveys completed; deploying in Q2.

Learning

Designing a survey to measure successful performance and guide improvement is challenging, and we have not yet determined how we could turn this data into a meaningful KPI. However, while feedback from the completed staff survey was generally positive, we have confirmed areas of improvement around response time for large, cross-team projects and the need for clarity on contact points for trust & safety issues (several noted uncertainty on whom to contact). Survey responses also reinforce the need for tracking of tasks to ensure that smaller issues are not lost.

Q1 - Support & Safety

Objective: Maintain the Core 

Objective	Measure of success	Status
Goal 4. CORE Maintain the core. (Annual Plan - CE - Program 11)	<ul style="list-style-type: none">• Design methods to track non-emergency safety requests and timing.• Execute and maintain core workflows with 95% of inquiries responded to within 2 business days.	<ul style="list-style-type: none">• Ongoing, but incomplete. OfficeWiki tracking page and temporary offwiki tracking process created while investigating long term ticket management system.• Complete

Learning

- Tracking non-emergency safety requests complicated by multitude of current request channels and waiting too long to work on stop gap measures.
- Original expected strategy (sugarCRM case management) fell through after work to speed up was not successful. Current speed is not suitable for the workload.
- Investigation done on multiple options for better tracking included Phabricator, Asana and ZenDesk (considered too expensive). None of the available options worked great but Asana being used as part of current process.
- Legal review concluded for Help Scout which appears to be the best current option and offers possibility of greater use beyond T&S team. Setting up review starting this week.

SUCCESSSES

- This quarter, we relocated an international advocate, Joe Sutherland, to the United States, which is permitting us to back up critical ‘office only’ activities, including child protection where he has already assisted on 2 reports. We thank Legal and HR for their assistance with this.
- SuSa launched an internal newsletter with contributions from multiple teams and departments to help draw attention to major events of interest.
- SuSa explored multiple additional avenues for ameliorating behavioral issues on our sites over the last quarter, including meeting with external agencies who might offer victim support and exploring opportunities to better partner with other internet leaders. Both of these have offered potential future growth, although resourcing remains a challenge.
- We continued to support the Technical CoC working group in their efforts to finish the drafting and consensus process.
- SuSa prepared a presentation for the Board on our and other teams’ work on harassment, subsequently modified for a Metrics presentation.

MISSES

- SuSa remains short-staffed with its director at diminished capacity due to her dual role. Core services and commitments have been maintained, but this does have an impact in overall efficiency and reach.

Quarterly review

Programs (Education, TWL, GLAM)

Q1 - 2015/16

Approximate team size during this quarter:
4 FTE + contractor support + summer intern

Key performance indicators

TWL 12-month pageviews	1,109,004	+31% QoQ	n/a
TWL Unique recipients	2787	+2% QoQ	+14% YoY
Education program leaders served in (countries)	50 (23)	+32% (-4%) QoQ	-74% (-62%) YoY

Q1 - Education

Objective	Measure of success	Status
Support global programs through peer mentoring (Annual Plan - CE - Program 1, objectives 1 and 2)	<ul style="list-style-type: none">Adopt and pilot a mentoring framework and pipeline for Education Collaborative to offer more global support	<ul style="list-style-type: none">Framework shared with Collab, but the pipeline is still not established
	<ul style="list-style-type: none">Support education tracks at regional conferences (CEE, WikiConference India)	<ul style="list-style-type: none">Participation at two regional conferences with strong education tracks

Learning:

- Still refining the Education Collaborative model; we've received a lot of input from movement stakeholders (affiliates in particular).
- Competing goals with the Collab in Q1; the [#EduWiki social media campaign](#) will hopefully feed into the mentoring pipeline, but also pushes back its timeline.
- Team will continue to have regional focuses for each program manager, which will be settled in Q2 with new FTE on board.

Q1 - Education

Objective	Measure of success	Status
Support education community with core work.	<ul style="list-style-type: none">Produce Education Collab videos to promote program and best practices, updating toolkit and learning patterns	<ul style="list-style-type: none">Videos launched and shared in social media campaign. Still need to be included in toolkit and learning patterns.
	<ul style="list-style-type: none">Recruit and hire Education Program Coordinator as req backfill	<ul style="list-style-type: none">New Education Manager joins team in Q2
	<ul style="list-style-type: none">Intern to focus on #EduWiki campaign	<ul style="list-style-type: none">#EduWiki campaign launched with intern support

Learning

- Video series was a huge amount of work from many teams. Thanks to L&E, Communications, and our summer intern, Loreen, for helping to get these videos out into the world!
- Hiring was more complex than expected. Thanks to Recruiting and Talent & Culture for guidance during the process, even when it was bumpy.
- Our summer intern was a huge support to team workflows. Thanks to María Cruz for managing her in SF, and Maria O’Neil for putting the intern program on our radar.

Q1 - TWL + GLAM

Objective: Research and Community support



Objective	Measure of success	Status
<p>Enhance research access and efficiency with publisher partnerships, onwiki resources, and technical tools; improve GLAM community with consultations, support, and organizational outreach.</p>	<ul style="list-style-type: none"> 4 new partners/expansions (2 non-EN); 300 accounts and 50 new users; 1 global branch contacting publishers; pitch toll-free model 	<ul style="list-style-type: none"> 5 partners but only one non-EN; ~200 accounts, 50 new users; no global branches contacting; toll-free pitched
	<ul style="list-style-type: none"> Run TWL Branch Strategy; 5 new language leaders; 1 new community consultation, developed language, and emerging community branch; framework for sharing learnings across TWL; TWL guides to Meta. Consult 20 GLAM leaders; Help European GLAM Coordinators plan meeting; Continue conversations with Europeana, Internet Archive and IFLA 	<ul style="list-style-type: none"> Branch strategy to Q2; new language leaders; no consultation & developed or emerging branch; built sharing framework; moved guides. Consulted with GLAM leaders; helped with Europe meeting; Continued key conversations and identified other organizations
	<ul style="list-style-type: none"> Library card alpha and pilot; ‘Research help’ report; WikiCite next steps; develop OABot; library access notifications; Analyze Special:linksearch; OCLC negotiation for EZproxy and discovery. CE Program Tech needs list; Consult on structured data on Commons; Design consult for Maps & Graphs reuse. 	<ul style="list-style-type: none"> Released library card alpha but did not pilot signup; Research help report released; WikiCite Next Steps; OABot developed; library notifications moved to Q2; talking with OCLC. Supported Tools needs and wishlist; consulted on structured data; designed maps consult

Q1 - TWL + GLAM

Objective: Capacity and communications



Objective	Measure of success	Status
<p>Improve GLAM documentation and emerging community, non-Chapter resources; improve communication channels and extend our network of influence.</p>	<ul style="list-style-type: none"> Deploy GLAM Documentation consult; Develop “Wikidata + GLAM” story; Evaluate GLAM-US Bootcamp trainings and integrate into international materials; Leadership framework for PC&L; Community portal for digitization best practices and support; Digitization guidelines for Community Resource grant; Support Community Tech on WikiSource; Document an emerging community GLAM project from Wikimania 	<ul style="list-style-type: none"> GLAM Documentation consultation to Q2; Developed “Why Wikidata + GLAM” story; Evaluated GLAM-US Bootcamp trainings but not integrated; Drafted leadership framework for PC&L; Created community portal for digitization; Drafted digitization guidelines for Community Resource grant; Supported Community Tech improvements to WikiSource; Documented an emerging community GLAM project from Wikimania
	<ul style="list-style-type: none"> IFLA paper; ARL engagement strategy; Contact DLF, ILN and CrossRef; Supervise library school practicums; Attend IFLA; Host 2 Partnerships Brunches; Pursue outside funding with 1 partner; Find volunteers for This Month in GLAM and GLAM-Wiki; Publish WMF report for This Month in GLAM; Create strategy for glam@wikimedia.org; Investigate GLAM help triage 	<ul style="list-style-type: none"> IFLA paper written; ARL engagement strategy drafted; Contacted DLF, ILN and CrossRef; Supervised library schools; Attended IFLA; Hosted 2 Brunches; Pursued funding; Didn’t find volunteers for This Month in GLAM; Published WMF report for This Month in GLAM; Created strategy for glam@wikimedia.org; Investigated GLAM help triage options

SUCCESSSES

- IFLA white paper launch creates major positive conversation
- Successful ARL + Wikipedia summit during IFLA conference
- Wikidata + GLAM blog post conveys important story and development
- Five new or significantly expanded publisher partnerships coordinated well by Sam Walton
- Research Help report released for community comment
- Released alpha Library Card Platform for signups
- OABot developed and citation icons approved in main citation template
- Major potential donor for Structured Data on Commons

MISSES

- Global TWL Branch strategy not getting sufficient support; hiring contractor in Q2
- Account distribution sluggish; will improve in Q2 with Library Card release and upgrades

Quarterly review

Community Resources

Q1 - 2016/17

Approximate team size during this quarter: 10

Community Resources provides funding and other resources to mission-allied organizations and people around the world. We support communities (individuals, groups and organizations) to build healthy communities, innovate new ideas for programs and technology in the service of Wikimedia's content and communities, and grow and scale effective ideas.

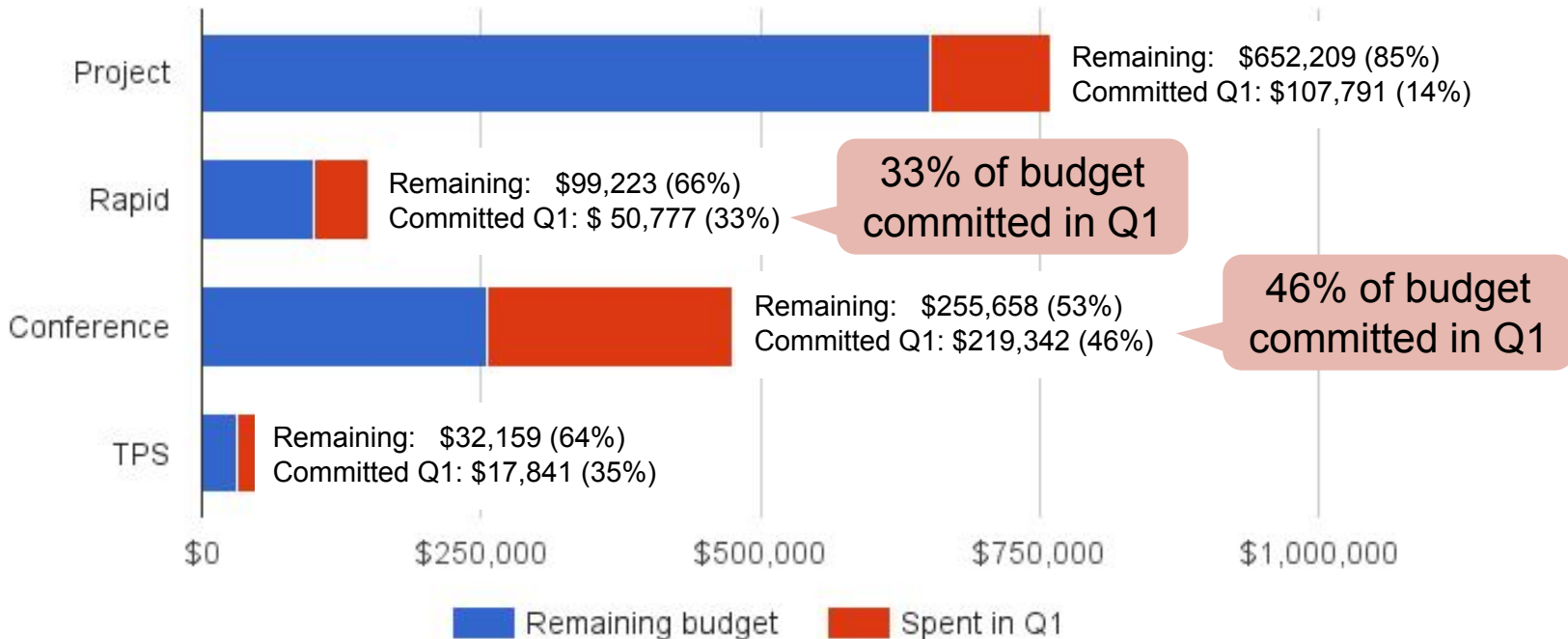
Key performance indicators

People supported <i>Global metrics from reports by resourced initiatives this Q</i>	Active editors: 7,298	New editors: 4,971	Total individuals involved: 30,443
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Grants to Emerging Communities approved this Q	115 grants	\$194,890	62% of total #	35% of total \$	+259% # QoQ	-61% \$ QoQ	+15% # YoY	-37% \$ YoY
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Q1 - Community Resources

Spending by grant program in Q1, and remaining budget



Q1 - Community Resources

Obj 1: Implement grants restructure



Objective	Measure of success	Status
Goal 1: Continue implementation of grants restructure (Annual Plan - CE - Program 4 - Obj 2)	*Launch conference and quarterly project grants	*Conference & Project Grants launched (Wikicon North America and 6 Project Grants funded)
	*Continue work on portal	*New grants portal created by CR, rather than a contractor
	*Recruit + train project and conference grant committee members	*Two committees recruited, trained, and reviewing grants
	*Transition TPS responsibility	*TPS being revised to increase impact and efficiency

Learning: Initial feedback on grants restructure indicates we're meeting community needs and have improved the process in terms of clarity and efficiency. This quarter, in Rapid Grants along we funded 36 grants in 24 countries, including 23 new grantees.

Q1 - Community Resources

Obj 3: Maintain the core

Objective	Measure of success	Status
<p>Goal 3. Maintain grant programs and workflows and CCD program support (Annual Plan - CE - Program 4 - Obj 1 & Program 9 - Obj 2)</p>	<ul style="list-style-type: none">*Meet commitments for 10 of 10 grantmaking workflows*Onboard new APG Program Officer*Recruit new APG full and simple committee members*Complete review of PEG requests, reports submitted FY15-16*Follow up + support Community Capacity Development pilots; publish post-training surveys analysis; conduct general community surveys	<ul style="list-style-type: none">*New APG PO onboarded*New APG committee members recruited (FDC and Simple)*PEG reports not yet closed out due to start of new grant program*10 PEG grants for \$107,791 funded* CCD pilots in progress; post-training surveys and analyses published; general community surveys postponed to Q2.

Learning: Grantmaking commitments are being met while our capacity is stretched to new limits. We have seen an **increase in 50% of grants approved from last year Q1**, and 90% increase from the previous year.



Recent grant highlights

RAPID: <u>Scientific Committee on Antarctic Research</u>	PEG: <u>Atikamekw language & WikiVillages du Cameroun</u>	APG: Multi-year funding pilot
<ul style="list-style-type: none">• Increased the number of biographies for Antarctic women from 7 to >90,• Five articles profiled as DYK's• Working with the Women in Red WikiProject, organized an online editathon for the month of August.	<ul style="list-style-type: none">• Increasing First Nations and Cameroonian knowledge, heritage, culture and languages in projects• Outreach & training sessions with local and indigenous communities	<ul style="list-style-type: none">• Multi-year grantmaking is good practice; helps orgs focus on programs and not fundraising• Recommended by FDC Advisory Group, and endorsed by WMF ED• Initially challenging to implement, unable to do so for 2 years• This round, FDC will consider applications from Wikimedia Sverige and Wikimedia Österreich



Objective	Measure of success	Status
Goal 4. Prepare and communicate impact report on prior Inspire Campaigns (Annual Plan - CE - Program 9 - Obj 1)	*Develop analysis/reporting plan for funded Inspire Campaign ideas to summarize outcomes	*Report on Gender Gap Inspire Campaign is complete and on Meta
	*Develop communication plan for publishing this report widely in the community and outside Wikimedia projects as appropriate.	*Communication plan still being developed with help from María Cruz

As an initial experiment in proactive grantmaking, the Gender Gap Inspire campaign was a success: ~600 people were engaged, ~13,000 articles were created or improved, and women were 86% of grant-funded project leaders.

Learning: The goals we set shape the ideas we get.

For our future work on the gender gap, we are interested in trying new or improved models that will ignite innovative thinking, i.e. ideas that will go beyond traditional assumptions about how to address the gender gap.

Q1 - Community Resources

Obj 2: Launch Grant Metrics

Objective	Measure of success	Status
Goal 2: Launch updated grant metrics (Annual Plan - CE - Program 4 - Obj 2)	*Updated Grant Metrics is included in Project grants	*Updated grant metrics are now included in FDC APG & Simple APG, proposals, and Project grant reports
	*Scope update to resources and tools support	*New Metrics Library project planned to start in Q2 or Q3.
	*Finalize transition plan for APG and SAPG	*New/improved tools to collect metrics are included in CE Technical requests to Engineering.

Learning: We still need to address one of the largest issues: making it easier to collect metrics. Volunteers are spending a significant amount of time on collecting metrics.

Quarterly review

Learning & Evaluation

Q1 - 2015/16

Approximate team size during this quarter: 4

Key performance indicators

Community leader engagements	104 Unique Leaders (134 Engagements)	-42% QoQ (-49% QoQ)	-44%YoY (-46% YoY)
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Note: Engagement number are lower both QoQ and YoY this quarter due to the Wikimania occurring in Q1 2015/16 vs Q4 in 2016/17, really there are signs of increased reach per staff as YoY our FTEs have been reduced from 7 in Q1 2015 to only 4 for Q1 2016

Q1 - Learning & Evaluation

Objective	Measure of success	Status
Develop redesign plan for team portals (Annual Plan - CE - Program 3, objective 2)	<ul style="list-style-type: none">* Develop redesign plan for the Evaluation Portal and other L&E resources for Q2 to correspond with lessons from phase 1 UX research* Plan phase 2 UX research design study	Completed the planning for phase 2 UX research as well as the review of lessons learned for designing next steps for Q2 and Q3 implementation targets including the adjusted target of developing the portal redesign plan.

Learning:

From UX research phase 1, we have learned how Wikimedians prefer to network, through personal contacts on email and social media, while search on wiki and google comes in a second place. In a similar fashion, we also have findings on search and learning habits. We plan to develop a brief overview for presentation of lessons learned for a learning circle share back to the WRC planning and design group in Q2.

Objective	Measure of success	Status
Community Engagement Insights - Develop surveys & initiate survey collection for CE Insights (Annual Plan - CE - Program 1, objective 3)	<ul style="list-style-type: none">* Complete first draft of CE Insights performance surveys (5 audiences) prepared for question testing* Data collection completed for August Pulse survey* Develop survey templates for conferences (pre-conference and post-conference)	Survey drafts are near completion and are moving forward in pilot testing. August Pulse survey was cancelled; inquiries have been integrated into the CE Insights annual survey excluding one audience, researchers which was held back from this round of surveys. Survey templates for conferences are in progress but incomplete.

Learning:

The process so far has been very successful. Through workshops, the application, and coaching activities, teams have come up with excellent survey questions that we can use and improve each year. Thanks especially to the 13 teams who input questions and the folks across the organization who have really helped with this process including those in the Survey Design, Communications, Community, and Translation working groups. And a huge thank you to those of you have dug into the questions and helped us improve the questions: Neil Quinn, Sherry Snyder, Nick Wilson and Kalliope Tsouroupidou.

Q1 - Learning & Evaluation

Objective	Measure of success	Status
Goal 2. Define “Leadership” development pathways and provide support to regional learning events (Annual Plan - CE - Program 1, objective 1)	<ul style="list-style-type: none">* Gather community feedback on defining leadership and leadership pipelines for next year’s peer academy revisions to the current Learning Days pre-conferences* Support regional conferences (CEE Meeting, WikiConference India) with learning and evaluation content support as needed	Complete. The Leadership Development Dialogue is open through October 16th and has engaged 23 community members on the talk page and had 26 user sessions submitting 352 votes on the All our Ideas survey so far. Provided learning support to 5 sessions at WikiConference India and for a survey design session at CEE Meeting for 84 participant engagements in workshops at those events.

Learning:

In terms of responsive workshop support. It was easy to adapt our past Learning Day session evaluation form for use at single sessions and the feedback gathered is very helpful for iterating on workshop design. We now need to develop a more systematic process to ensure proper space for that reflection and integration.

Q1 - Learning & Evaluation

Objective: Develop and Maintain Core Support Processes

Objective	Measure of success	Status
Support evaluation design and new affiliate partnerships (Annual Plan - CE - Program 6, objectives 2 & 3)	<ul style="list-style-type: none">* Support the committee to launch Welcome Kit for new affiliates* Provide SMART targets consultation by request for FDC Round I applicants	Complete. Launched new affiliate welcome kit and provided SMART consultation as requested for FDC proposals.
Maintain Core	<ul style="list-style-type: none">* Maintain consistency and responsiveness on all regular workflows	Most workflow responsiveness standards were maintained, however, AffCom review pipelines have not

Learning:

Some of our team's capacity has been limited due to the intensity of the CE Insights survey development work. We are working across the team to provide overload support, but are struggling with capacity within our current FTE headcount and project commitments.

Category	Workflow	Comments	Type
Community Leadership Development	Conference Partnerships	In early August we provided learning support for six sessions at WikiConference India (Leading 3 workshops and lending facilitation to 2 others). In late August we provided support for learning about community listening and a surveys session at CEE Meeting in Armenia.	M
	Coaching & Consultations	34 community leaders were consulted for learning and evaluation across 70 consultations in Q1: 46 on program design, 14 on evaluation, 4 for tools or technical support, 4 for a variety of topics in a single session, and 2 for communications.	M
	In-person & Virtual Meet-ups	Hosted four learning and evaluation workshops resulting in 84 community leader engagements through offerings at WikiConference India and CEE Meeting.	M
Learning Infrastructure	Communications	<ul style="list-style-type: none"> * Announcements * Evaluation Portal, Learning Quarterly Newsletter, Facebook, Twitter * Blogs 	M

Appendices

Q1 - Technical Collaboration

Tech Community Metrics	This quarter	Previous quarter	QoQ	YoY	Type
Median age of open changesets waiting for review	65.1 days	84.4 days	-22.9%	66.9%	R
Median age of open changesets waiting for review (MediaWiki core)	114.3 days	94.1 days	21.5%	134.2%	R
Number of open changesets waiting for review	1446	1265	14.3%	47.3%	R
Number of open changesets waiting for review (MediaWiki core)	285	278	2.5%	43.2%	R

Type: new, reactive, maintenance

Q1 - Technical Collaboration

Tech Community Metrics	This quarter	Previous quarter	QoQ	YoY	Type
Number of new changesets submitted per month	2835	2057	37.8%	-23.1%	N
Number of code uploaders per month	214	202	5.9%	0.9%	N
Number of code reviewers per month	182	165	10.3%	-6.7%	R
Number of code committers per month	132	121	9.1%	1.5%	R

Type: new, reactive, maintenance

Q1 - Technical Collaboration

Tech Community Metrics	This quarter	Previous quarter	QoQ	YoY	Type
Number of active users in Phabricator per month	856	836	2.4%	-0.8%	M
Number of new accounts in Phabricator per month	313	240	30.4%	-13.8%	N

Type: new, reactive, maintenance

Topic	This quarter	Previous	QoQ	YoY	Type
12-month [Category:TWL] pageviews	1,109,004	848,940	+31%	n/a	M
Total accounts distributed	6394	6177	+4%	+36%	M
Total unique recipients	2787	2732	+2%	+14%	M
Total publisher partners	64	58	+10%	+52%	M
Citations added to partners	11,507	25,959	-55%	-14%	M
Total global branches	22	22	0%	+100%	M
Total library coordinators	58	57	+2%	+45%	M
Average access delivery time (less is better)	22 days	48 days	(-54%)	(-58%)	M

Diversity of New Grants in Q1^[1]

Grants to...	Number of grants	Amount in dollars	Proportion of total ^[2]		QoQ		YoY	
			# of grants	\$ of grants	# of grants	\$ of grants	# of grants	\$ of grants
Individuals	169	\$274,618	91%	50%	+504%	+113%	+21%	-12%
Emerging communities	115	\$194,890	62%	35%	+259%	-61%	+15%	-37%
Gender Gap focused	8	\$12,788	4%	2%	+100%	+11%	+167%	+86%

[1] Why do we track this diversity? Because WMF explicitly aims to fund:

- not only organizations, but also individuals
- not only Global North communities, but also Global South projects aimed at addressing the gender gap


[2] Column will not add up to 100% because a grant can be tagged in multiple categories

186 new grants funded at \$550,369 to 58 countries

Type of grants	# of grants	Amount in dollars	Proportion	
			# of grants	\$ of grants
Conference Grants	2	\$219,342	1%	40%
Project & Event Grants	10	\$107,791	5%	20%
Rapid Grants	36	\$50,777	20%	9%
Travel & Participation Support	11	\$17,841	6%	3%
Wikimania Scholarships	127	\$154,619	68%	28%
Total	186	\$550,369	100%	100%

(Last Q: 56 grants at \$1,572,422 to 33 countries)

Q1 - Learning & Evaluation

Topic	This Q	Previous Q	QoQ	YoY	
Unique Leaders Engaged by L&E (Engagements)	104 (134)	179 (262*)	-42% (-49%)	-44%¹ (-46%)	
Evaluation Portal Resource Pageviews (Unique Editors)	29,029 (9)	27,261 (87)	+6% (-90%)	-125% ² (-4%) ³	
Learning Patterns created by community members (Unique Community Editors)	57 (62)	34 (59)	+67% (+5%)	-3% (-17%) ⁴	
Qualtrics: New Surveys (Users)	33 (63)	30 (59)	10% (+7%)	-15% (+34%)	
Program Leader consultations	64	104	-38%	-16%	
AffCom Support: User Group Recognitions (Renewals)	9 (3)	4 (9)	+125% (-67%)	n/a	

¹ Leaders engaged is lower both QoQ and YoY this quarter due to the Wikimania 2015 falling in Q1 15/16 and Wikimania 2016 falling in Q4 16/17.

² Resource pageviews is negative YoY because the community health campaign was last summer (about 16K pageviews), and we actively publishing reports last year Q1

³ Portal resources edits outside of the Learning Pattern Library have been deprioritized while we focus on the design of the Wikimedia Resource Center and UX Research for portal redesign. With no event pages added or calls to action posted to the portal pages in Q1, it is expected that editors counts are minimal.

⁴ YoY observation for learning patterns is likely related to the timing of Wikimania and related awareness drives for the library. Peaks in activity tend to correlate with Learning Day and grants reporting events causing a peak in Q4, and sometimes in Q2.

* Corrected - previous report included WMF staff engagements.