

Overview of Round 1 2012-13 Annual Plan Grants

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1. FDC allocations 2012-2014
2. Context of Round 1 2012-13
3. FY13 Financials
4. FY13 Program Impact
5. FY13 Organizational Effectiveness
6. FY13 Learning

Each funding round yields a variety of rich information; after three rounds of funding, we have a full set of data for one round

✓ = completed

See: [APG Proposal and Reporting Timeline](#)

	Round 1 2012-13	Round 2 2012-13	Round 1 2013-14	Round 2 2013-14
Proposal	✓	✓	✓	✓
Q1 Report	✓	✓	✓	Oct-2014
Q2 Report	✓	✓	Jul-2014	Feb-2014
Q3 Report	✓	✓	Oct-2014	May-2014
Impact Report	✓	Sep-2014	Mar-2014	Oct-2014

This report is focused on the first round of funding for which we have a full set of data; it includes basic funding information on the other rounds

A note on the data presented in this document ...

This report relies on the reporting accuracy and consistency of our movement partners. FDC grantees self-evaluated and reported about their inputs (money, time, people, etc) and their outputs/outcomes (quantity of activities they have conducted, material produced, individuals reached).

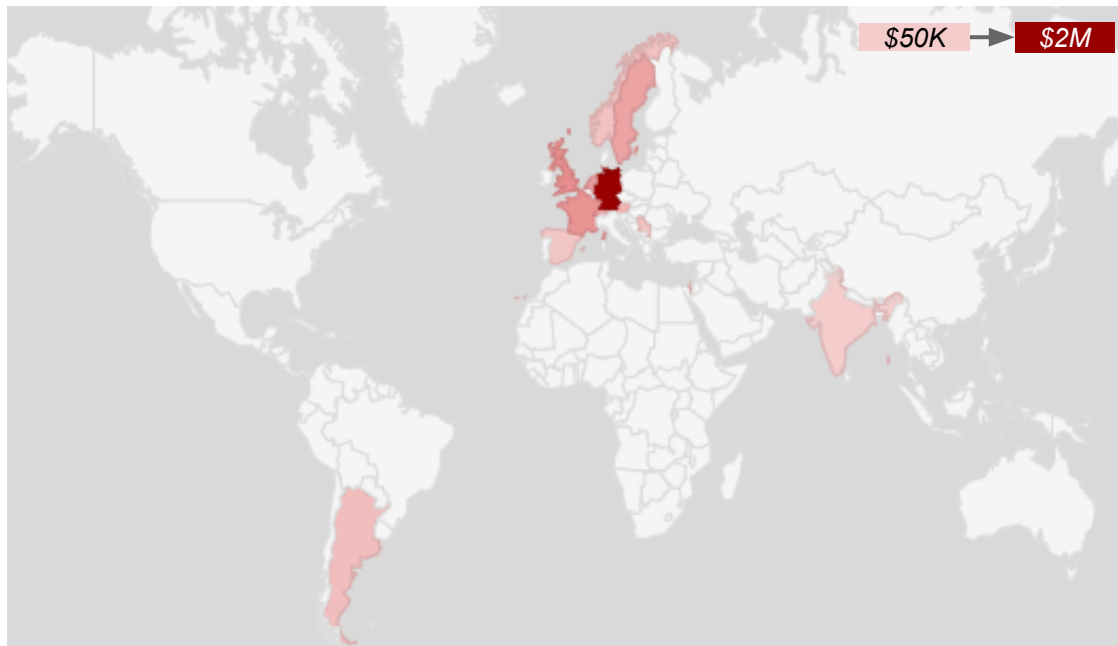
The data gathered through the reports is good, but it is incomplete: we do not have a comprehensive set of information. We know there are more things - articles, photos, events - which happened than are captured here.

Data Limitations

- *Inconsistent **metrics** reported (e.g., # of articles, # of events, # of participants)*
- *Inconsistent **definitions** (e.g., “Membership,” “Administrative expenses”)*
- ***Incomplete** data sets reported (e.g., only the number attendees for a sample of events per organization)*

Since its inception, the FDC has allocated over \$9M in funding to 14 organizations

Relative FDC allocation by country, 2013

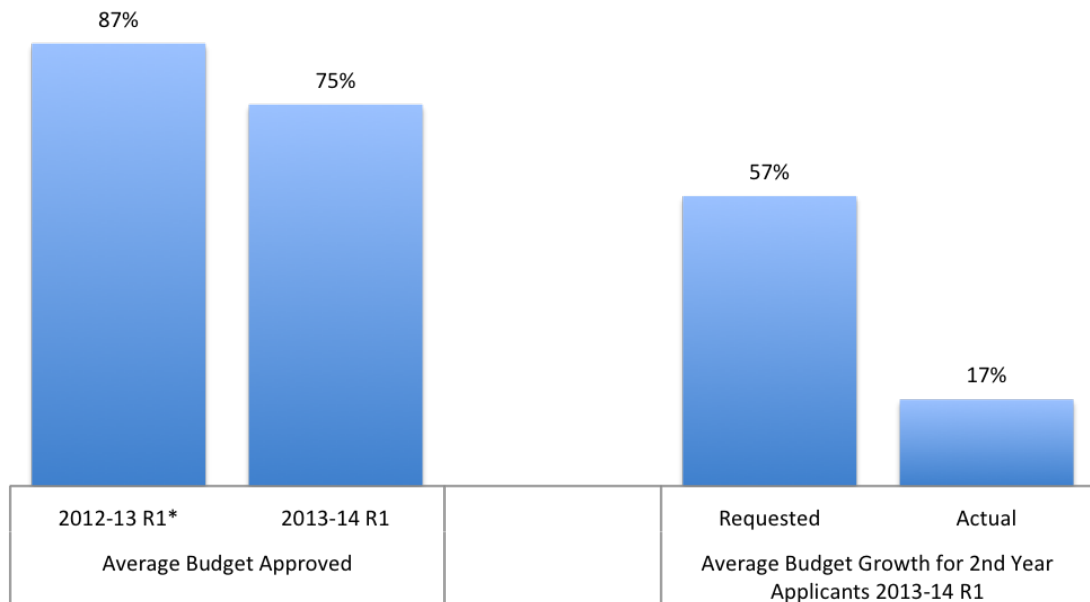


Total FDC funding, 2012 - 2014

Organization	2012-13	2013-14
Wikimedia Amical		\$100,000
Wikimedia Argentina	\$146,854	\$175,000
Wikimedia Austria	\$220,000	\$276,000
Wikimedia France	\$619,000	<i>(applying)</i>
Wikimedia Germany	\$1,790,000	\$1,750,000
Wikimedia Hungary	\$64,477	
Wikimedia India		\$53,000
Wikimedia Israel	\$141,172	\$200,000
Wikimedia Netherlands	\$350,000	\$410,000
Wikimedia Norway	\$140,000	<i>(applying)</i>
Wikimedia Serbia		\$108,000
Wikimedia Sweden	\$341,570	\$390,000
Wikimedia Switzerland	\$390,465	\$400,000
Wikimedia United Kingdom	\$536,336	\$570,000
Total:	\$4,739,874	\$4,432,000

So far in the second year of the FDC, the FDC has given smaller approvals on average, but grown organizations at 16%

Change in Requested and Actual Budgets



Avg. Grant 2012-13: \$271K
(Excluding WMDE)

Avg. Grant 2013-14: \$268K
(Excluding WMDE)

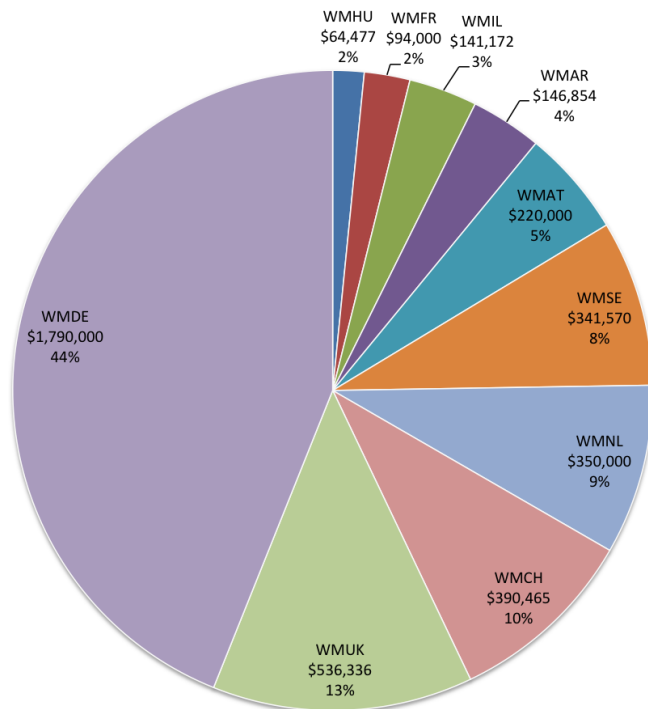
In R1 2013-14, the FDC approved 12% less of proposed budgets from each organization than 2012-13 R1.

- In part, this decrease is due to returning entities requests for an average budget increase of 57%, far exceeding the 20% growth rate guardrail set out in the Annual Plan Grant funding framework.

* Average does not include WMAU who was not funded due to compliance issues, or WMFR, who received bridge funding of \$94,000 and was deferred to R2.

In Round 1, 2012-13, the FDC allocated \$4M to 10 organizations (excluding WMF)

Funding Allocated by Organization



Average Grant Amount: \$270K

(Excludes WMFR and outlier WMDE)*

% of funds requested received: 87%

*Range of funds received**:* 58 - 100%

% distribution to Europe: 93%

59% of funding went to chapters working primarily on German Wikipedia (WMDE, WMAT, WMCH)

* Wikimedia France received \$94K for 6 months of “bridge funding;” they applied for a full 12 months of funding in round 2 (and received \$525K)

** Wikimedia Australia did not receive funding due to compliance issues

Further details on four exceptional applicants in Round 1, 2012-13

Wikimedia Australia

- Requested \$291K
- Received \$0 due to compliance
- *Excluded from averages*

Wikimedia Foundation

- Requested \$4.5M
- Received 100%
- Requested for “non-core” activities; is not applying again for a dollar amount from FDC
- *Excluded from all averages*

Wikimedia Hungary

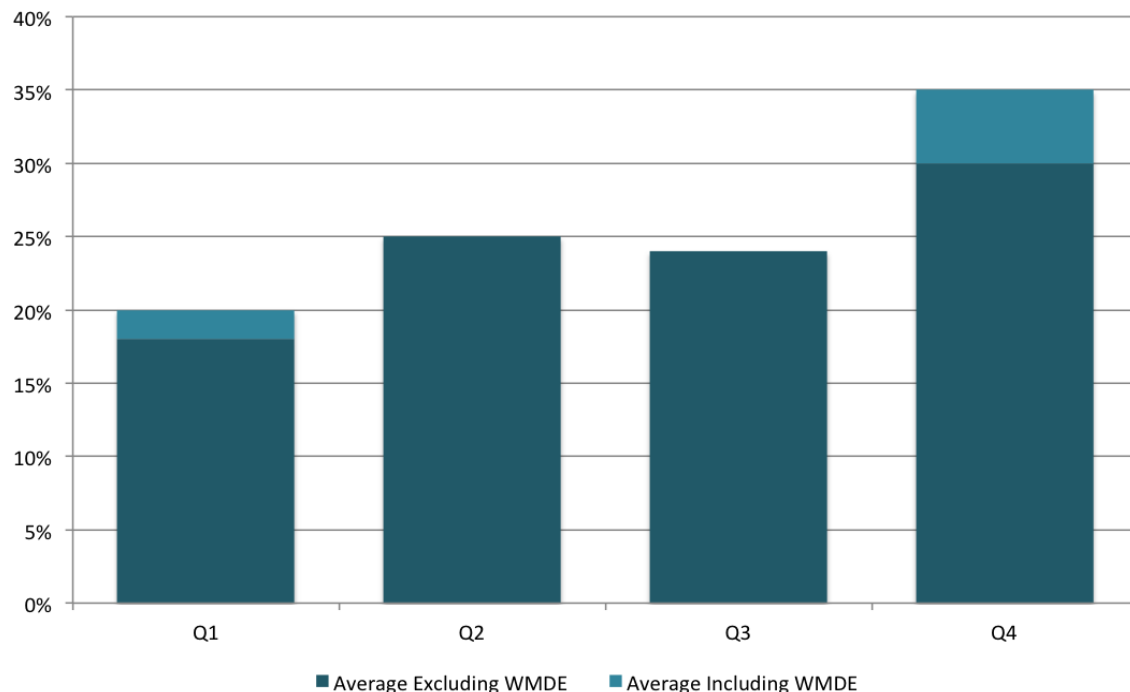
- Requested \$67K
- Received 100%
- Was unable to spend money, so grant time was extended to 18 months
- *Excluded from 12 month impact and spending analysis*

Wikimedia France

- Requested \$961K
- Received 10%
- FDC allocated 6 months of “bridge funding” to WMFR, encouraging them to rethink strategy and apply again in round 2
- *Excluded from 12 month spending averages, but use impact and lessons*

Only 2 of 9 organizations reported unspent Annual Plan Grant funds; majority of spending was in last quarter

Spending by Quarter on Total Revenue



Less than 1% of FDC allocated funds were unspent.

Some organizations reported that acceleration in spending was due to delays in hiring.

WMDE was 4% over budget and spent 9% more than income.

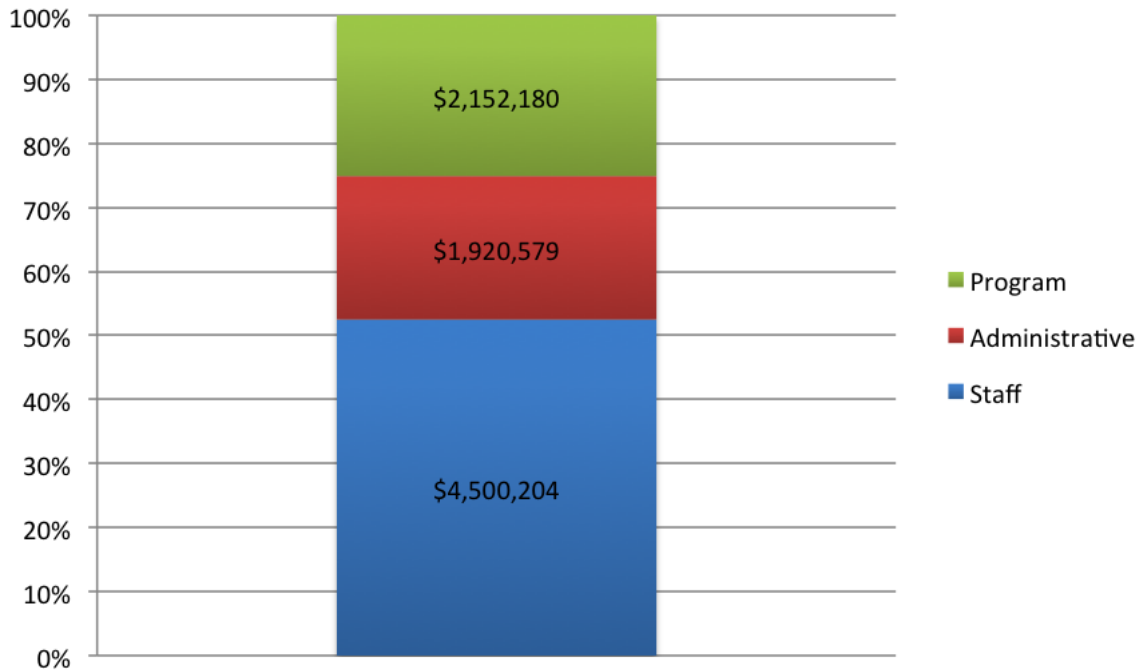
Other organizations spent 96% of their income but just 85% of what they had budgeted.

Some organizations supplemented revenue with reserve funds (WMIL, WMDE, WMCH, WMUK).

* WMFR and WMHU are not included in this table

\$6.4M of total revenue (APG + other) was spent on staff and administration, or 75% of total budget

Spending by Category on Total Revenue



Administrative costs include:

- fundraising fees
- board expenses
- office rent and equipment
- IT infrastructure used for programs
- travel reimbursement for volunteers and staff

Program spending does not account for the cost of staff to plan and execute programs.

Many organizations reported that program expenses were reduced due to in-kind contributions.

* WMHU and WMFR not included in this chart, due to non-annual grant periods

After receiving final FDC allocations, program funding was cut to cover staff and administrative costs

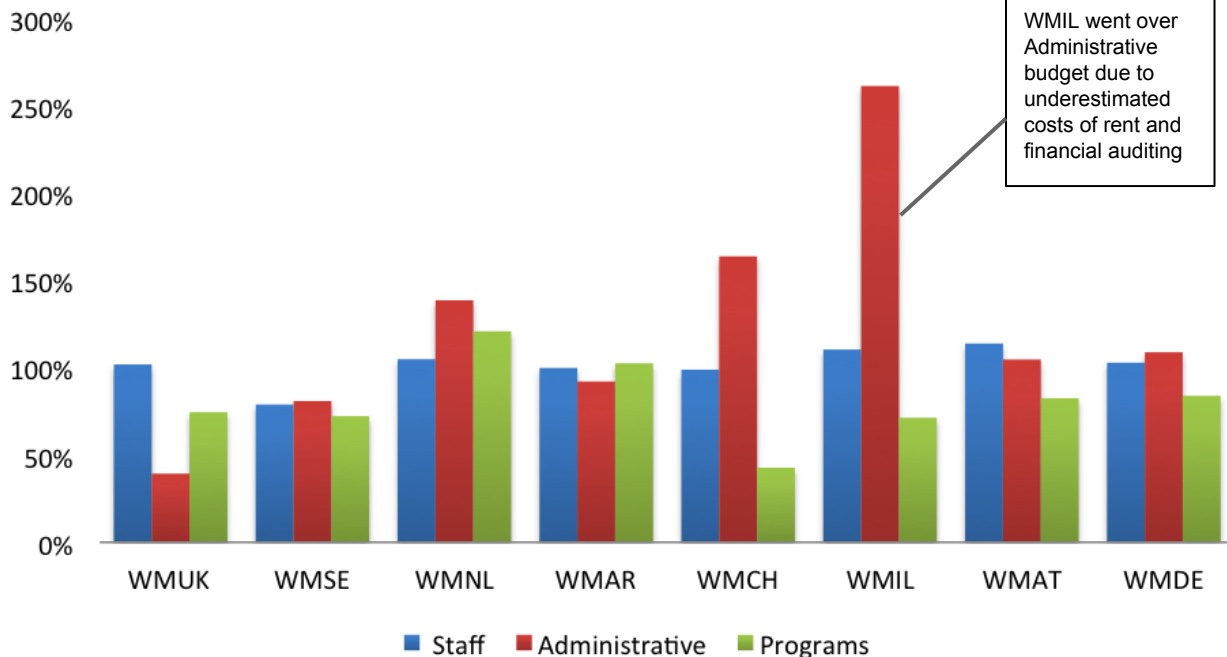
Organizations spent 19% less on programs than proposed in budget.

Many organizations who received less funding than planned cut back on programs but did not reduce spending elsewhere.

On average, organizations were 24% over budget on administrative spending.

- Newer chapters found it difficult to estimate startup costs
- Successful fundraising programs led to increases in processing costs
- Board governance issues led to increases in board meeting expenses

Spending Against Budget



Case Study: What happened when an organization had less funding than planned?

Wikimedia Austria (WMAT) received 91% of FDC funds requested, which they cited as the primary reason for **reduced spending in programs** “Programs reduced as we received less FDC funds and donations than planned.” 14% over budget on staff, 4% over on administrative, 17% under on program spending. They spent 97% of their income.

Wikimedia Switzerland (WMCH) received 65% of funding requested from the FDC and planned to use reserves to continue with the plans and budget described in the FDC proposal. Although they spent 95% of their income, this only accounted for 78% of the budget they had allocated.

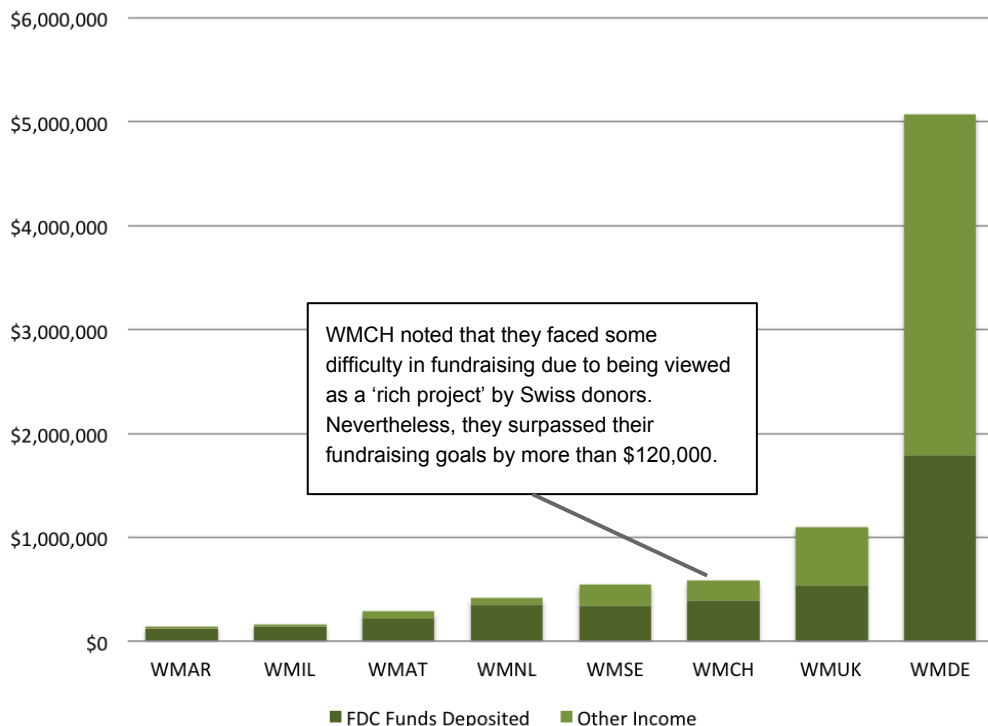
Staff spending was 99% of budget, administrative costs (excluding fundraising expenses and web hosting) were 64% over budget and **program spending was reduced by more than 50%** for a variety of reasons (projects delayed, canceled or less successful or less expensive than planned).

Wikimedia Netherlands (WMNL) received 74% amount of request. FDC funds made up 84% of their income. They **reallocated budget** to manage their program plan, with program spending went 21% over budget, and Administrative spending was 39% over budget. WMNL spent 103% of their income.

Wikimedia Sweden (WMSE) received the full amount requested from the FDC, but did not meet external fundraising goals, which reduced their anticipated income by 20%. In turn, they “...**did not hire at the same pace as planned**,” reducing their staffing budget by 21%. **Program spending was reduced** by 28%, in part due to reduced income but also due to feedback from the community. Administrative spending was reduced by 19%. They spent 99% of their income.

All organizations engaged in some form of external fundraising

Income Source by Organization



AGP as % of total Revenue (non WMDE): **65%**
(range 48 - 87%)

WMDE APG as % of total Revenue: **35%**

Differences in fundraising abilities were attributed to cultural attitudes toward charitable giving and local laws governing fundraising.

Lessons learned:

Many chapters found that it was easier to get in-kind support for programs and events than to engage in fundraising.

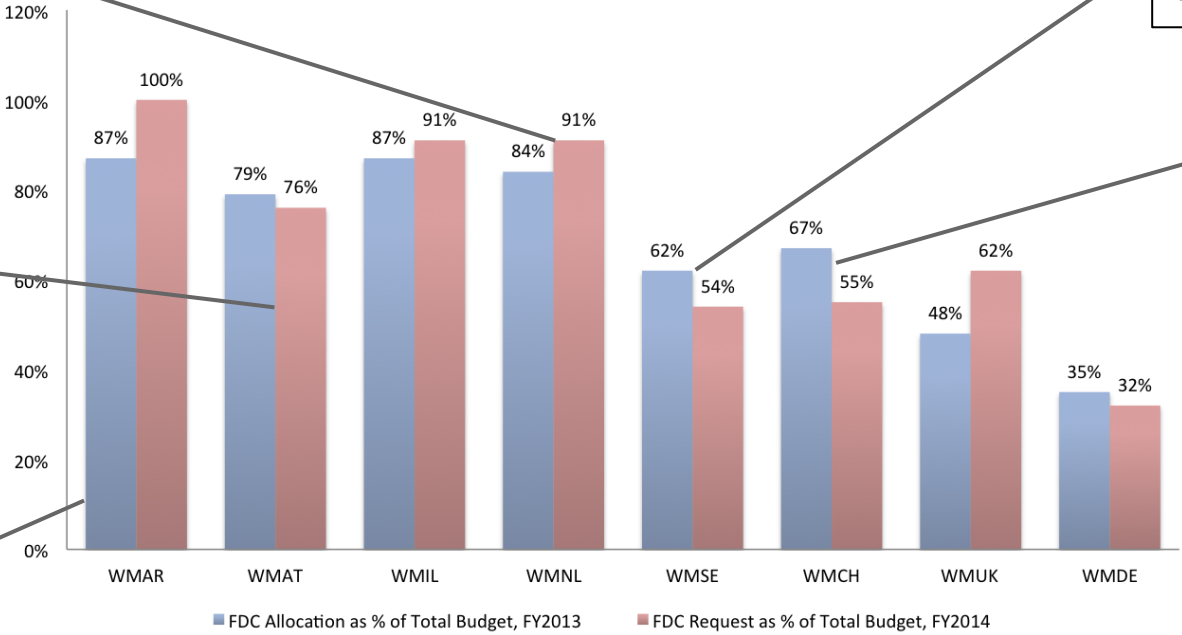
Half of FDC funded organizations from 2013 increased external fundraising projections in their FDC proposal for 2014

WMNL is not able to engage in fundraising due to government regulations in the charity sector.

In FY2013 WMAT successfully applied for the Austrian Fundraising Certificate.

The bulk of WMAR external funds in FY2013 came from participating in a Creative Commons conference.

FDC Income as Percent of Budget



WMSE focused on developing partnerships in FY2013 to enable more fundraising in FY2014.

WMCH exceeded FY2013 fundraising goals by more than \$120,000.

Organizations are funded to make progress towards Wikimedia Movement strategic priorities in their local areas

Increase Participation

Sample programs:

- Editathons
- Meet-ups

Sample impact metrics:

- # of new editors
- # of active editors

Improve Quality

Sample programs:

- Education program
- GLAM partnerships
- Wiki Loves Monuments

Sample impact metrics:

- # of new articles
- # of quality images

Increase Reach

Sample programs:

- Offline Wikipedia
- Social Media campaign

Sample impact metrics:

- Increase in pageviews
- # of new readers

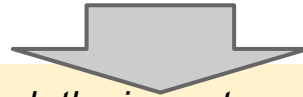
Encourage Innovation

Examples:

- New programs (e.g., WikiMini)
- Process changes on old programs

Sample impact metrics:

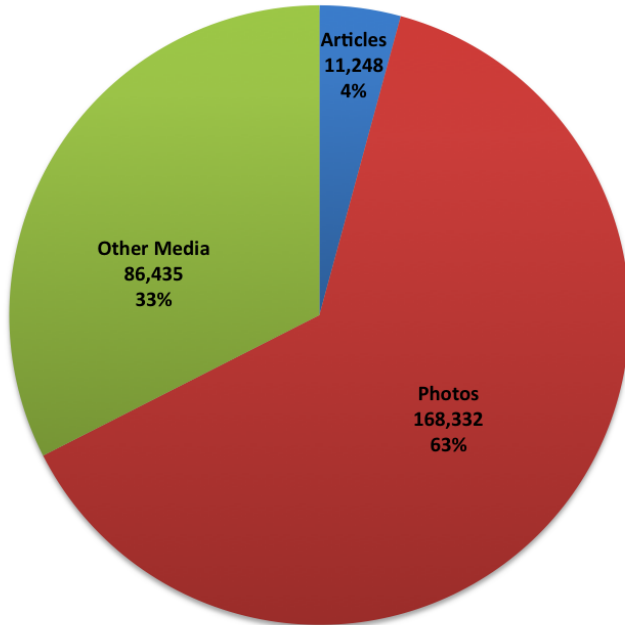
- # new users
- Change in outcomes after new process



We looked through the impact reports to see how funded organizations were making progress towards these strategic areas

Partners are doing work, however, we have an unclear picture of impact due to difficulties in measuring and inconsistent reporting

Online Impact of 2012-13 Round 1 Annual Plan Grants



Note: the following numbers represent only reported numbers; they are the minimum activities

Events: ~520

People reached: ~12,300

Scholarships and small grants distributed: ~600

Number of language projects: 9

Reasons for inconsistencies in reporting:

- Self-evaluation permitted; no specific metrics required in reports
- Began tracking only part-way through the year
- Volunteers with organizations were resistant to reporting outcomes and other metrics
- Lack of evaluation knowledge

Reported number of people reached by programs does not correspond to amount of FDC funds allocated

Four chapters who collectively received less than 25% of FDC allocated funds accounted for nearly 40% of people touched by APG funded programs.

On average, chapters reported **51 offline events**

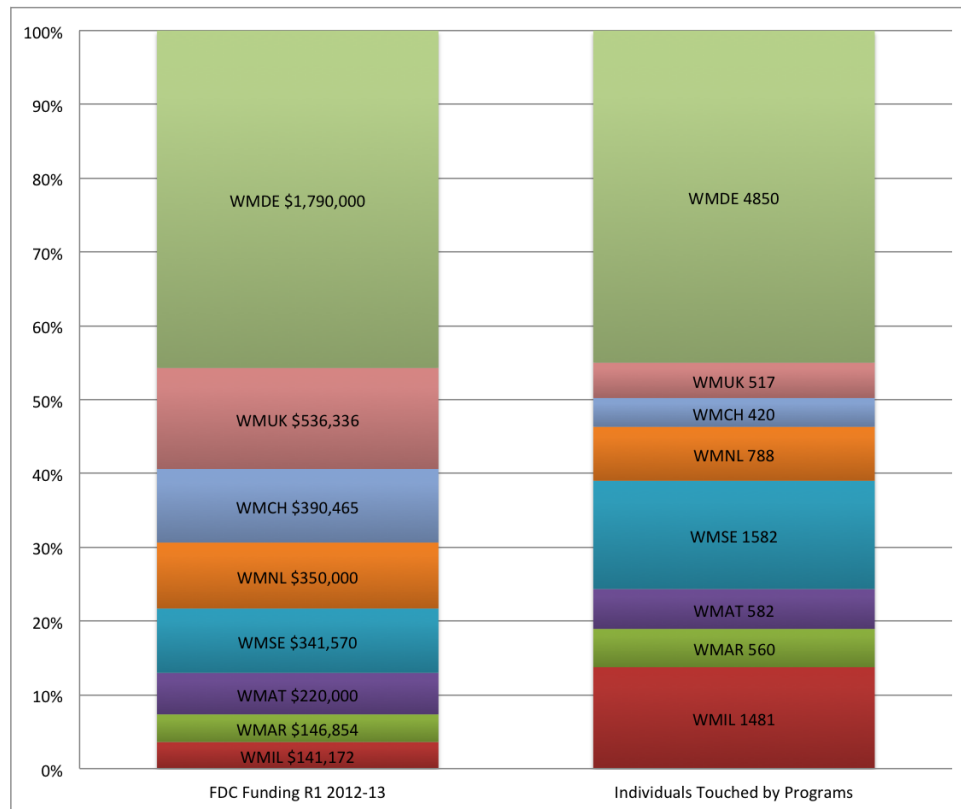
- WMSE reported 112
- WMIL reported 87

WMDE developed WikiData in 2013

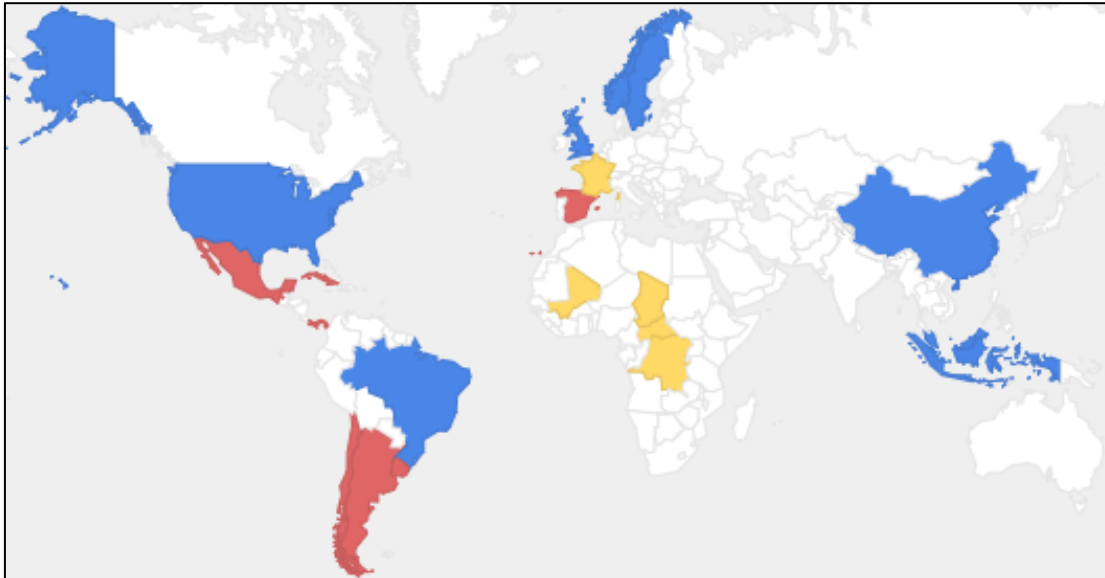
- 3,900 active and 600 very active editors
- 92.5 million edits
- 24 million statements

Individuals touched by programs is not a full reflection of chapter activity:

- inconsistent reporting
- difficulty evaluating reach of projects and activities conducted online
- figures may not include attendance at conferences



Annual Plan Grants have impact beyond the primary languages and geographies of funded organizations



- Mujeres Iberoamericana contest participants (WMAR)
- Afripédia events (WMFR)
- Swedish education video translated in local language (WMSE)

Global and Regional Initiatives from FDC Funding:

- WMAR produced neutral language materials and organized [writing contests](#) for users across Latin America and Spain.
- WMSE produced a [video](#) as part of their education program that was translated into 8 languages and is in use on 7 pages
- Several European chapters contributed to the [GWToolset](#) which supports mass uploads to Wikimedia Commons.
- WMFR supports [Afripédia](#), reaching 131 new users at universities in 5 Francophone African countries.

Funded organizations demonstrated the most success in quality of content related projects

Key Takeaways:

Local GLAM partnerships and education programs benefit from long term staff and are a key value-add of more formal organizations.

Contests, like Wiki Loves, generate significant content and new users.

Organizations are working to become more connected to editor communities. Some are distributing mini grants and supporting contributors through access to technology and events, which is directly adding content to the online Wikimedia projects

GLAM initiatives bring important documents online, but successful partnerships can require significant investment of staff or volunteer time.

- **58 GLAM partnerships**
- **1,809* documents/photos/files** uploaded to Commons per partnership
- Several chapters report high demand for partnerships from GLAMs

* Average based on reports from 37 GLAM partnerships.

'Wiki Loves' photo contests are popular with volunteers, engage many new users and generate considerable content. However, only 1% of photos are recognized as 'Quality Images' and many organizations report it is difficult to retain new contributors.

- **107,364 photos** added to Commons through [WLM](#) and other photo contests.
- **1,788 participants** reported* in 15 contests
- Wiki Loves Antarctica, Wiki Loves Food, Wiki Loves Public Art

* Based on reports from 5 chapters.

Technology Pools make high-quality equipment available to the community to document important national events.

- **583 users supported by 5 chapters**
- **73,098 photos, videos and sound recordings**
- Several chapters arranged for press credentials for volunteers to attend events.

Beyond direct content related projects, chapters developed programs in education and diversity



Wikimini piloting students at a fair in Gothenburg (WMSE)CCBYSA, by User: Abbedabb



Wikimedia Argentina with a representative of Guarani people in Jujuy Province. CCBYSA, by User:B1mbo

Education initiatives were in high demand by community members

- MOOCs - Argentina worked with University of Buenos Aires to produce a collaborative learning MOCC that reached 2,500 Spanish speaking teachers globally. More than 200 teachers participated in online workshops and activities focused on editing Wikipedia.
- WikiMed in Israel - 62 Medical School students learned to edit Wikipedia in a 13 week elective course taught by WMIL volunteers. 133 medical related articles were written in Hebrew.
- Wikipedia for Immigrants in Sweden - 23 participants started new articles about Sweden in 11 languages. 30 teachers were trained to incorporate Wikipedia translation exercises in 'Swedish for Immigrants' courses.
- Wikimini in Sweden and France - [Wikimini](#) is an encyclopedia edited and used by 8-13 year olds. It has 13,672 daily pageviews, 21,526 registered users, nearly 14,000 articles and 70,000 pages, and is being translated into 3 new languages.

Diversity Programs

- WMCH carried out a pilot program using [Kiwix](#) to give Swiss prisoners offline access to Wikipedia. In one location, all 18 of the 36 prisoners who rent or own computers have requested Wikipedia offline.
- WMAR organized successful regional events on diversity issues, including meetings with representatives of indigenous groups and a Wiki Loves Latin American Women editing contest that generated 1,227 new or improved articles by 27 participants in 10 countries.
- In addition to 9 language Wikipedias, chapters reported activities that contributed to WikiSource, Wiktionary, WikiData, QRpedia and several other wiki projects.

In 2013, organizations grew staff extensively to reach program goals and attempt to build more local effectiveness

Staff helped grow programs; consultants provided strategic improvement.

Hiring consultants for needs assessments, translation services, governance strategy and to develop evaluation tools led to lower spending and better reporting.

- fewer board meetings needed (UK)
- less staff time spent on translating reports (FR)
- clearer and more consistent metrics (UK, FR)

Many chapters hired part time staff.

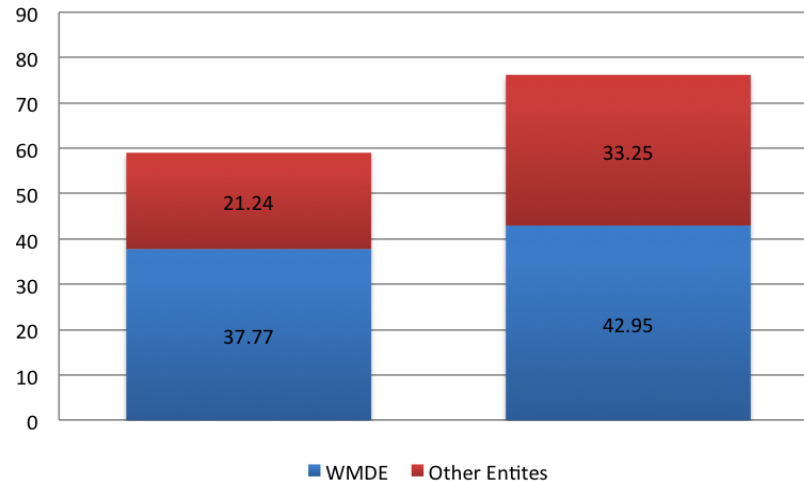
"Having an Education Manager, one GLAM-technician and a CEO made all our work both more effective and efficient. If we had not had an Education Manager, the entire program Free knowledge in education would have come out with a lot less value towards the movement goals."

Wikimedia Sweden

*"We need to have a **dedicated project manager** to support [Afrikipedia] activities: because of the distance and a specific need of support, it is very complicated to be enough in touch with people and to support the project day after day without specific people in charge of the projects."*

Wikimedia France

Number of FTE



Total new staff:

17.3 FTE

Average staff growth (non-WMDE):

69%

(range 24-263%)

WMDE staff growth:

14%

A focus of many FDC funded organizations was membership, which increased by 66%

Total reported members: 11,600

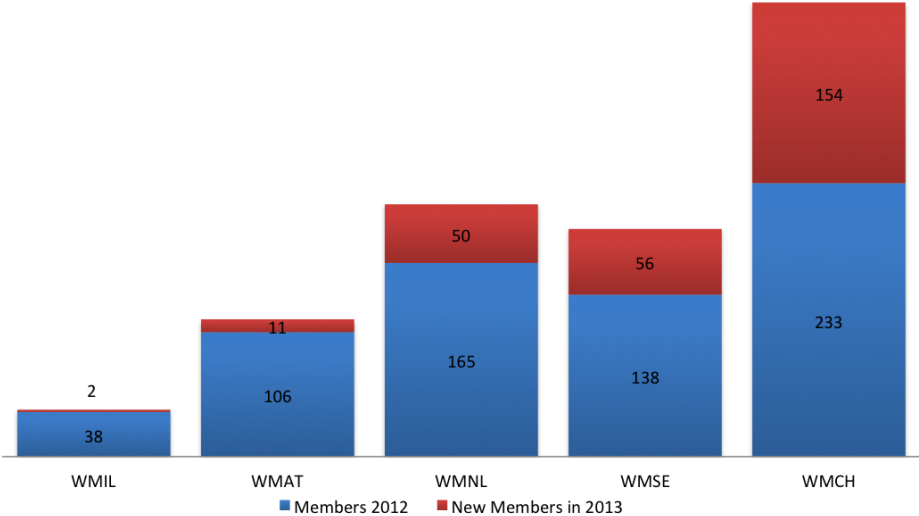
WMDE members: grew by 92% to 10,170

Non-WMDE members: grew by 40% to 1,361

Chapter membership is a limited measure of org effectiveness as it is defined differently by each organization and is not correlated to programmatic impact.

- WMIL has 40 members, only 2 of whom were new in 2013, however, chapter events regularly draw more than 100 participants and they have many active volunteers who do not identify as members.
- WMDE nearly doubled membership in 2013. Within this group, 1750 are identified as “active” members (17%).

Growth in Membership



* WMAR, WMUK, WMHU and WMFR did not report on growth in membership.

Organizations reported benefits from having an office space

- **Easier to meet with potential partners and generate media attention**
- **Space used by community members to host meetings and events in support of other movement organizations**
 - WMSE volunteers used conference room to host screenings for the Nordic Creative Commons Film Festival and for Swedish language classes.
 - WMDE space is used by many partner organizations.
- **Proximity to (or being housed within) like-minded organizations allowing for collaboration and partnership development**
 - WMAR houses their office within La Plata university.
 - WMUK office space location offers a connection to non profit community and tech

"Media interest in Wikipedia is high and since the establishment of the office there is a phone number journalists can call; this has increased media coverage."

Wikimedia Netherlands

"Having an office have been hugely beneficial for us this year. Potential partners have taken the time to visit our office when in town or nearby, which in an informal but very tangible way have strengthened our partnerships. We have also had the opportunity to give volunteers a place to have meetings in, over which a lot of appreciation has been made."

Wikimedia Sweden

"Since we established an office and have employees, WMAT was capable to intensify its networking efforts regarding like-minded organizations. We benefited from their expertise, resources and wider network regarding open data and the open data community which will also be helpful in the course of the project itself."

Wikimedia Austria



Wikimedia Sweden's office, CCBYSA, by User:John Andersson (WMSE)



Wikimedia Netherlands office, CCBYSA, by User:Ziko van Dijk

Annual Plan Grantees appear eager to collaborate on organizational effectiveness

“Institutional tutoring project” WMAR and WMDE

In March 2013, WMAR hosted a former employee from WMDE as part of an “institutional-tutoring” project.

*“The tutoring experience was a very interesting opportunity for us, not only to learn from other chapters but also to analyze internally our processes and activities. It helped us to detect spaces for improvement and raised awareness of the need to develop a clear strategy for next years. We believe this experience was very enriching and could work in other chapters all over the world. **However, it is important to be careful in which chapter to use to compare and learn. The gap between WM-AR and WM-DE was probably too big and made it difficult sometimes to compare.** In future tutoring programs, we recommend to have more similar institutions, where the structural gap is not that wide, so there are more opportunities for both institutions to learn and benefit in a more active way.”*

Standardized understanding of Volunteer engagement

FDC funded organizations have expressed interested in future collaboration in organizational effectiveness.

*“We wanted to conduct a survey among our volunteers concerning their view and satisfaction with our work. Unfortunately we were not able to accomplish the survey in 2013. **We want to do it thoroughly and generate comparability among chapters.**”*

Wikimedia Argentina

Wikimedia Austria

Example: [Wikimedia Boards Training Workshop](#)*

**Note: occurred early 2014*

- Hosted by Wikimedia UK, which had lots of organizational learning about the importance of boards and the need for good governance
- WMUK collaborated with WMDE, WMPL, WMNL and WMAU to reach over 20 board members from different chapters
- Experts in governance and strategy were brought in for capacity building
- After high satisfaction reviews, planning for a second workshop is underway

Common challenges were identified by organizations

Program

Community engagement: Organizations faced some difficulty establishing relationships with local editors; small grants have been harder to distribute than anticipated. *Some reports indicated that hiring 'Community Liaisons' has been [an effective way](#) to mitigate these issues.*

Prioritizing partnerships: Many organizations report receiving more requests for education programs and GLAM partnerships than they are able to take on. *Frameworks for identifying goals and prioritizing opportunities are needed.*

Program development: Organizations found they could not carry out the full slate of programs described in grant proposals. *[Targeting specific groups](#) or focusing on a smaller set of goals when developing programs could lead to better outcomes.*

Volunteer management: Chapters struggle to recruit and manage volunteers, and have volunteer burnout. *Chapters may benefit from guidance in recruiting new volunteers, volunteer friendly reporting tools, volunteer-staff working relationships.*

Organizational

Reporting: It is clear that some entities have more facility with English and narrative reporting than others. *Recommending the use of a translator may save time and lead to clearer reports.*

Estimating Budgets: Several newer entities reported budget variances due to difficulty estimating costs for office space and hiring, VAT, and auditing expenses. *It may be helpful to provide guidelines for entities who are establishing offices for the first time.*

Hiring and onboarding: Several entities reported that hiring employees has been a challenge. *[Learning patterns](#) with best practices for recruiting, interviews and new employee onboarding would be useful for many entities.*

Governance: Issues with board governance led to higher administrative costs. *WMF may be able to provide guidelines for recruiting and managing effective boards.*

At the conclusion of the first full year of funding expenditures, several takeaways emerge

- The Annual Plan Grants process is not appropriate for all entities (*see WMHU case study in backup*)
- Organizations are more intentionally seeking external funders, as was recommended by the board
- Organizations are prioritizing staff and administration costs over program costs
- Learning is taking place, but little of it has been systematically documented in learning patterns
- Chapters respond relatively well to specific reporting requirements (e.g., budget, hiring) but struggled with self-reporting on the more open program questions
- Support is needed to develop tools and guidelines for better measuring both programmatic impact and organizational effectiveness

Backup

WMHU Case Study

Funding situation: Wikimedia Hungary was founded in 2008 with a goal of promoting the creation, operation, and distribution of collections of knowledge that are freely editable and usable. They had virtually no budget until 2012, when they received \$47K in funding from the WMF Grants program. In Round 1 of the FDC, 2012-13, WMHU applied for \$64K in funding: a 43% growth rate. They received the full amount requested.

Complication: Though well intentioned, WMHU was not able to execute on the magnitude of their proposed plan. A variety of problems presented themselves:

- struggle in **leadership**: turnover of the board happened one-quarter into the project
- struggle in **planning**: request of more funding than needed resulted in significant under-spending; a more ambitious plan than could be accomplished
- cultural **context around volunteerism**: volunteering is not common in Hungary, and WMHU struggled to get volunteers to maintain the programs needed

WMHU Snapshot

Growth rate with FDC	43%	Spending after 12 months	47%
Challenges	* Not enough local volunteers to manage programs * Local leadership challenges * Poor planning		
Solution	Focused on strengths: program-based activities anchored in community. Shifted to Project Grants		

Resolution: WMHU was permitted to extend its grant period another 6 months for a total of 18 months, and they focused their energies on what they are good at: **specific programs with the backing of the limited volunteers**. They have been able to grow these program activities without growing staff, reducing funds request by 50%. As a result, they will seek any additional funding at a project based level through the project & event grants program.

Funding summaries

	2012-13 R1	2012-13 R2	2013-14 R1
Total Applicants	11	4	11
Total funded applicants	9 <i>(excludes WMFR)</i>	2	11
Min	\$0	\$0	\$53K
Min Funded	\$67K	\$140K	\$53K
Max Funded	\$1,790K	\$525K	\$1,750K
Average <i>(if funded)</i>	\$439K	\$333K	\$403K
Average, excluding Germany	\$271K	\$333K	\$268K

More Sources:

[FDC round 1, 2013-14
Financial Overview](#)

[FDC round 2, 2013-14
Financial Overview](#)