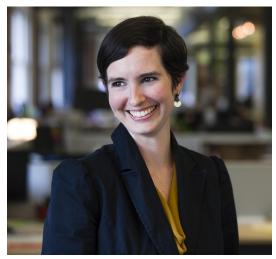
Designing SMART Proposals

Wikimania 2015 Mexico City, Mexico

0. Who we are



By Myleen Hollero / Wikimedia Foundation [CC BY-SA 3.0 via Wikimedia Commons]

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Agenda:

- 1. Begin with community
- 2. Terminology
- 3. SMART
- 4. Group exercise
- 5. Wrap-up

1. Begin with community



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1. Begin with community

Understanding...

needs interests capacity leadership How...

survey
on-wiki planning pages
mailing lists
social media
in-person meetings

2. Terminology: "Goal"

Definition: Broad statement of the desired situation.

Examples:

Recruit new contributors.
Retain existing contributors.
Increase the diversity of contributors.
Increase quality content on Wikipedia.

2. Terminology: "Objective", "Measure of success"

Definition: Guidelines for accomplishing your goal.

Who/what will change?
How will it change?
How much will it change?
How will the change be measured?
When will the changes happen?

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- Who we reach: **Participants**
- What we do: Activities
- What we create during the event: Direct products

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- What we do: Activities
- What we create during the event: Direct products

"Outcome"

- Results in terms of Participant Learning
- Results in terms of Action
- Results in changes to Conditions

2. Terminology - Example for an editing workshop

Goal: Recruiting new contributors

Example objective:

Output 70% of participants will make at least five edits to Wikimedia projects within one month of the editing workshop.

3. Setting objectives, measures of success: SMART process

Specific

Measurable

Achievable

Relevant

Time-bound

3. SMART: Specific

Be specific, rather than general. Clearly state the issue, the target group, the time and place of the program.

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Unspecific: To raise awareness of our friendly space policy.

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Specific: *Increase support of community members for the friendly space policy.*

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Non-measureable: *Increase community members support for the friendly space policy.*

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Example goal: To support activities that ensure our offline events are 'friendly' spaces that welcome and encourage new editors

Non-measureable: To raise awareness of our friendly space policy.

Measureable: Increase community members support for the friendly space policy to 50% as demonstrated in responses on the annual community survey.

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Unrealistic: The majority of students will rate Wikimedia as cool.

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Be realistic about what the program can achieve. Consider scale/scope of activities, time and resources available.

Example goal: To work with students to produce high quality images to contribute to Wikimedia.

Unrealistic: The majority of students will rate Wikimedia as cool.

Realistic: 75 to 100 new valued images will be added to Commons by participating students.

3. SMART: Relevant

Objectives should be **relevant to the goal** and your program activities.

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Not relevant: The majority of students will rate Wikimedia as cool.

More relevant: 75 to 100 new valued images will be added to Commons by participating students.

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Be clear about the **timeframe** of the program and expected changes.

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Example goal: To work with students to produce high quality images to contribute to Wikimedia.

Not time-bound: The majority of students will rate Wikimedia as cool.

Time-bound: 75 to 100 new valued images will be added to Commons by participating students by December 2015.

Questions?

5. Group Exercise

- 1. Get in groups of 4-6
- 2. Review a previous grant proposal and assess:
 - Strengths
 - Weaknesses -- what info is missing?
 - Are the goals SMART?
- 3. Take on a role: Committee member, Community member
 - What would additional question would you ask the grantee, based on your role?
 - Anything you'd suggest adding, clarifying or removing?

Wrap-up

Back up

1. Begin with community

Capacity

WM Ukraine: https://meta.wikimedia.org/wiki/Grants:

PEG/WM_UA/Programs_in_Ukraine_2014#Resources

https://meta.wikimedia.org/wiki/Grants:

PEG/WM_AM/2014#Resources_and_Risks

Notification

WM US-DC: https://meta.wikimedia.org/wiki/Grants:PEG/WM_US-

DC/Projects_2015#Community_notification

Common Questions

4. Common questions: How do we know what metrics are appropriate for our programs?

Check out these resources!

- 1. Refer to the SMART process
- 2. Evaluation Portal: <u>Evaluation reports</u>, <u>Learning Patterns</u>, <u>Program resources</u>
- 3. Review similar grant reports
- 4. Connect with other program leaders
- 5. Ask WMF staff

What if our plans change throughout the year?

That's ok!

Plans change.

- Notify your community/board early on to figure out alternatives.
- Program officers can approve grant changes to programs/budgets.

When are we ready to write an annual plan?

- 1. When you know what programs work and which don't.
- When you have a reliable group of offline volunteers and program leaders to deliver on your proposed programs.

What is the timeline for creating an annual plan?

Annual plans take lots of time!

- Community engagement & feedback
- Coordination with the board & program leaders
- Drafting and revising the plan

Start at least 3 months before you'll need funding.

Project & Event Grants: 6-8 weeks for committee review → funding

Can we experiment with new programs in an annual plan?

Yes!

Annual plans focus on growth -- known programs with impact -- but there is room for experimentation and taking risks.

How do we budget?

- 1. EXPERIENCE
- 2. Compare costs
- 3. Give yourself a little cushion (~10%)