

Designing SMART Proposals

Wikimania 2015

Mexico City, Mexico

0. Who we are



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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?

2. Terminology: “Output” versus “Outcome”

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

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“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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Unspecific: *To raise awareness of our friendly space policy.*

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

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Non-measurable: *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-measurable: *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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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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Example goal: To work with students to produce high quality images to contribute to Wikimedia.

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: [Evaluation reports](#), [Learning Patterns](#), [Program resources](#)
3. Review similar [grant reports](#)
4. Connect with other program leaders
5. Ask WMF staff

4. Common questions:

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.

4. Common questions

When are we ready to write an annual plan?

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

4. Common questions

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

4. Common questions

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.

4. Common questions

How do we budget?

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