

FDC Year 1 Process Review, 2012-13

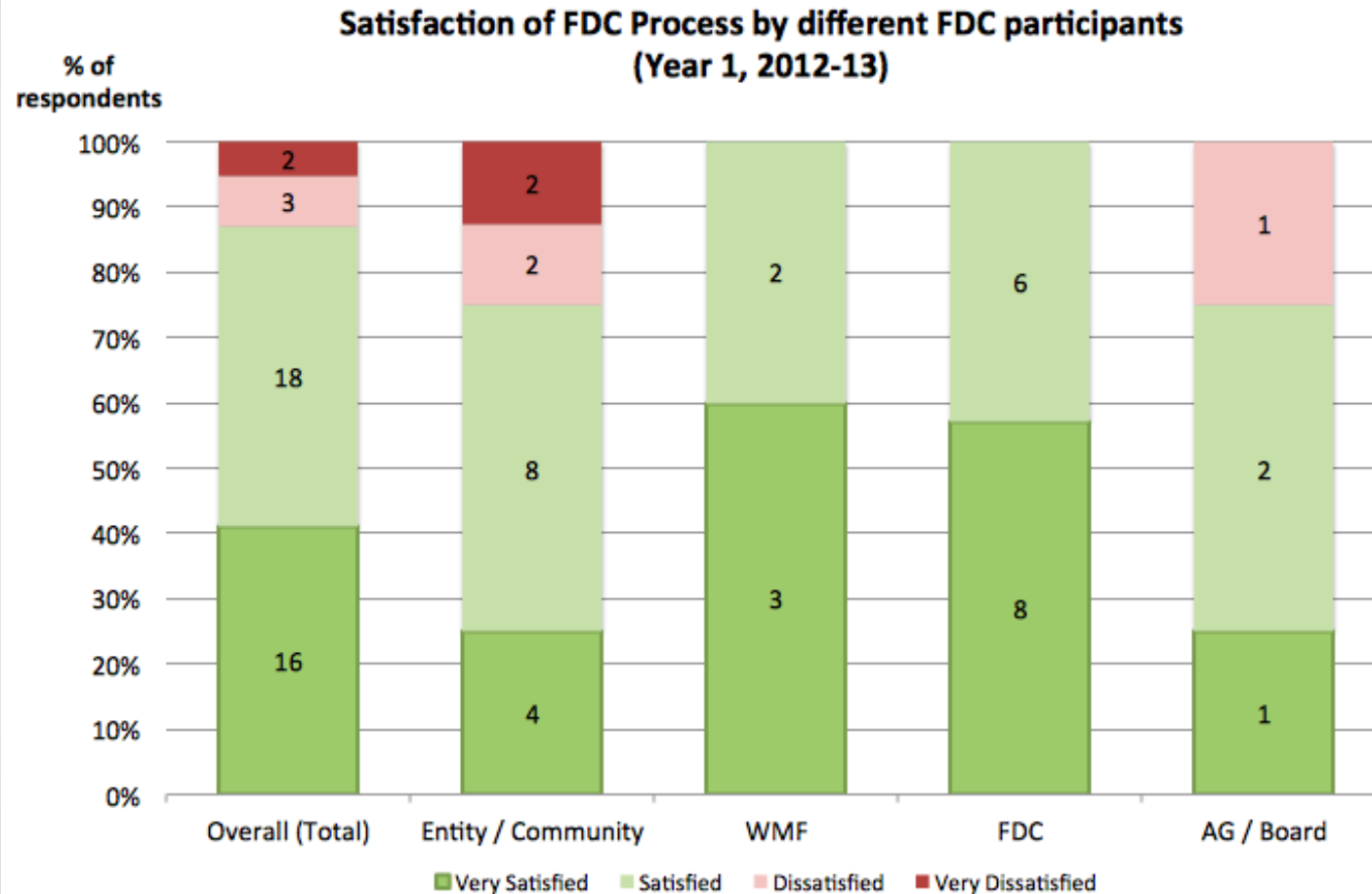
Implications from Process Surveys after first two rounds of FDC funding

July 2013

Executive Summary

1. Over the first year, all parties have been satisfied overall with the FDC process
2. While the process is deemed appropriately time-consuming given the amounts and nature of the funds, the FDC should continue to seek ways to minimize difficulties in the process. For example, the FDC could explore ways to:
 - a. Incorporate other forms than MediaWiki for inputs, such as a Google spreadsheet for financial statements
 - b. Continue to simplify the proposal template
 - c. Identify the most critical questions during the proposal review period
3. Communication regarding eligibility, expectations, and proposal process should be augmented to better service different English skills and describe complicated policies. For example, the FDC could:
 - a. Offer various channels (phone, skype, IRC, and if possible, in person) for entities to engage with the FDC and FDC Staff. This could occur pre-proposal or during proposal review
 - b. Improve the portal to make it easier to find information and track conversations
 - c. Provide detail on purposes of different grants programs offered by WMF
4. Clarify contentious points in the process, most particularly around eligibility requirements for the FDC, expectations during proposal review, and complaints and appeals process

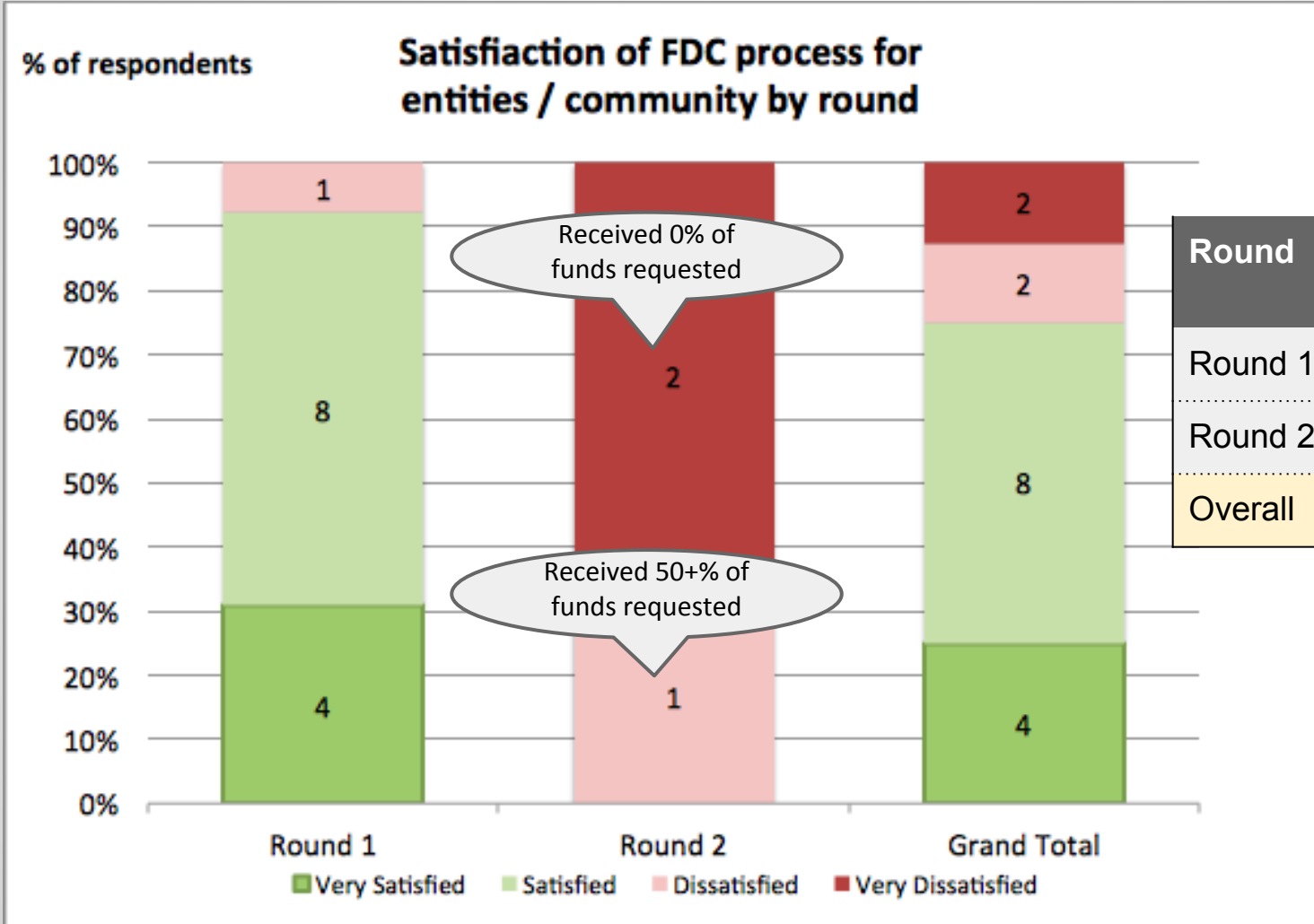
Overall, FDC participants are highly satisfied with the FDC process



"It was a fair process, external to the WMF, and oriented at continuous improvement of strategies and operations of Wikimedia communities."

"FDC Process is useful to force the structures to explain their plans and programs. I hope that it will be, after time, a good way to be more efficient with our programs : expanding editors and content, usecase for future, lessons and sharing of experience..."

Satisfaction of the entities was influenced greatly by the amount of funding they received



| Round | % of requested funds allocated |
|---------|--------------------------------|
| Round 1 | 81% |
| Round 2 | 55% |
| Overall | 78% |

Note: New question asked in Round 2 survey asking about percentage of funds received from the funding round (50% or more, less than 50%, 0%)

Rationale for satisfaction levels by respondents ...

Reasons for being satisfied

"[The FDC] achieved a good outcome, with only those chapters ready for FDC funding receiving it."

"[The FDC] want to do the right thing--be stewards of the movement resources and support impact, but also support the movement entities."

"There has been good involvement of stakeholders and FDC decisions have been respected."

"There's now a movement-wide group to scrutinise the budgets of every single Wikimedia organisation, including the WMF and the big chapters."

"The idea is great, and the execution was good. A lot of smart people designed the process, and I believe that the FDC has the potential to be a real game changer. "

"All applications were properly evaluated and the FDC members did pay attention to the Board guidance and the staff advice. The risk of controversy and dispute didn't influence the decisions the FDC took."

Reasons for being less than satisfied

"The FDC process is very demanding... [on] objectives and metrics. This is a very good thing but... requirements may be too large."

"too much of a process. Don't ask so many questions. Let us tell you what we think is important."

"The proposal process seems to be the most difficult one. Between all the deadlines and the forms to fill, and introducing projects in a way that they are clear a measurable, a lot of hours are spent, and some errors are likely to occur."

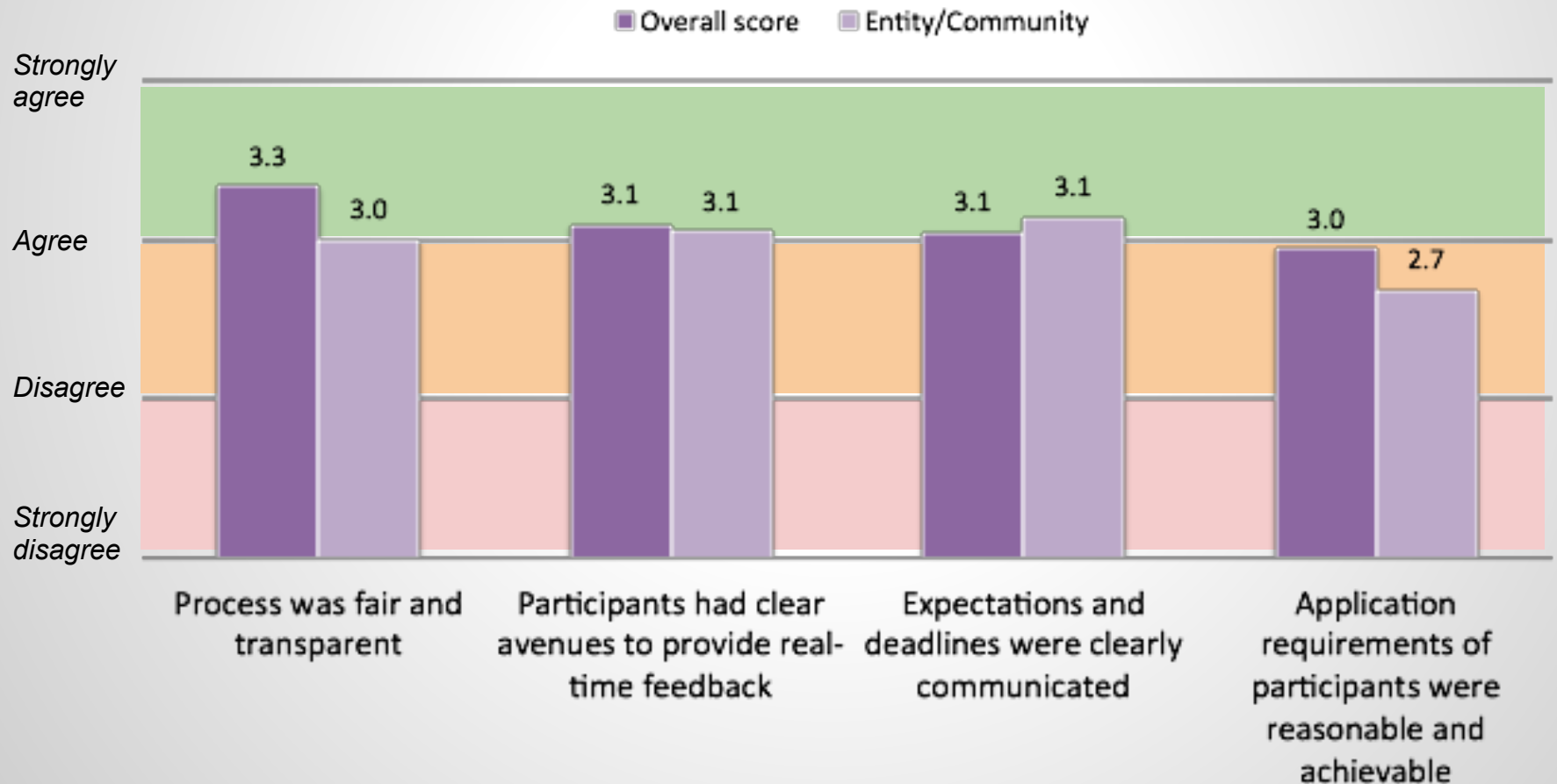
"I suspect the process was clear enough but the applicants did not talk enough to staff."

"[Entities] didn't understand the time and work involved with applying for the grants."

"The most difficult parts are perhaps the moments when the WMF staff proposal assessment was totally negative and I wonder what I've done wrong."

Overall, the process was deemed to be fair and transparent, though there is room to improve on expectations and communications

On a scale of 1–4, how much do you agree with the following statements about the most recent round of FDC funding allocations:



Clarity may be improved by increasing communication channels, articulating eligibility, and simplifying formats

Communication Channels

*"I regret that there is not **more dialogue** (eg chat or skype) between the FDC and structures. I regret not knowing the actual power of the staff ... and the level of information of the board of FDC. The process of FDC is correct but probably **forgets that participants are not native English speakers**. We have a huge translation work that takes a lot of time and can lead to misunderstandings."*

Eligibility Requirements

"Expectations weren't communicated at all...[consider the] 'retrospective disqualification' of WMCZ and WMHK."

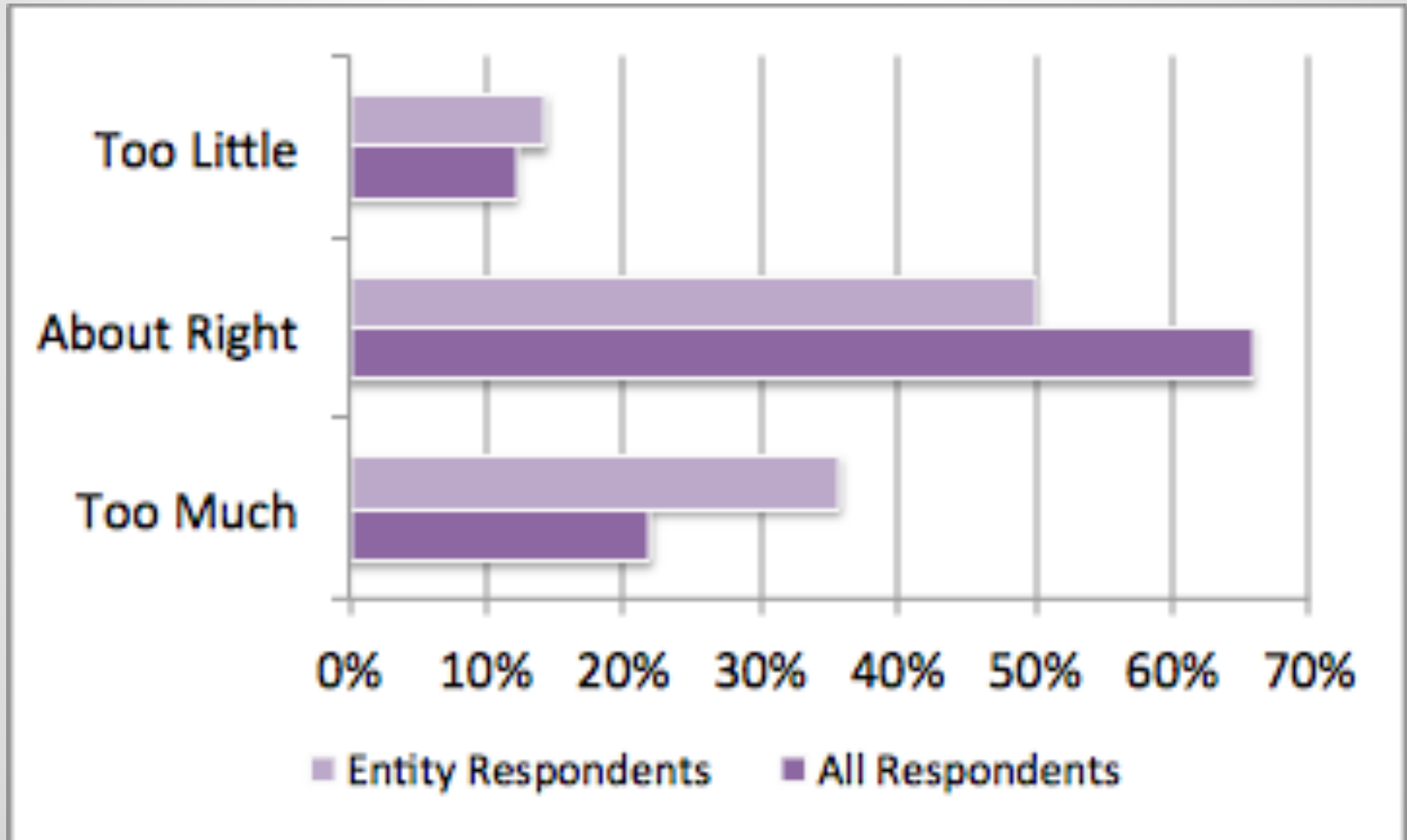
Proposal Templates

"I found the process smooth and easy, but I guess that is different for entities without paid staff. For us, especially the Wiki tabled were a pain, but manageable, because we had staff to do it."

~80% of respondents thought the amount of time taken for the FDC was "About Right" or "Too Little"

Q: How much time did you spend on the FDC?

Q: Given the scope of your role, do you think this amount of time was:



Respondents agree that the process is increasing community voice and improving conversations around impact

80% of respondents agree that the FDC process is producing more movement-wide information on impact...

...but impact and effectiveness remain to be seen

% of participant respondents



*"The FDC process is increasing the voice of the community and encouraging discussion around impact, although we still have a long way to go. The funded entities (and the FDC process via the funded entities) are not yet putting movement funds to the most efficient use possible, **but I hope the FDC process will in time encourage more efficient use of funds.**"*

*"The scope of the applications was not very broad or interesting. There were **very few new ideas.** Most chapters are doing essentially the same things. Too much money is spent on administration and overhead that is not really needed."*

*"The FDC is doing a great job with what it being given. But **at this point we do not have enough information** to know if the money is being well spent and having an impact."*

Note: First question around "Increasing community voice" was only asked in Round 2

Suggestions for improvement after Round 2

Increase direct communication:

with applicants through multiple channels (e.g., IRC, Skype)

Clarify eligibility:

Identify early and provide ongoing tracking of eligibility requirements for funding

Revise complaints & appeals description:

role of ombudsperson and overview of process

Articulate FDC grants expectations:

make clearer and compare to other WMF grants processes to ensure applicants know level of effort required

Simplify portal:

make it easier to search for and find information, including deadlines, eligibility, and updates

Simplify proposal form:

consider using forms other than MediaWiki to submit portions of proposals; simplify templates to make them easy to use