Wikimedia UK
Technology Project Management

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Executive Summary

Wikimedia UK is a charity with deep ties to technology, both as a direct part of its mission and to support its activities. From the start, this technical need has presented a problem both in resource and management. Initially contractors were employed to provide technology support, with management provided through existing staff. As the charity has matured technology needs have grown and conflicted. Despite their best efforts, staff are unable to provide expert technical support to the level required by Wikimedia UK.

This report concludes an undertaking to examine how Wikimedia UK interacts with technology, and how the charity has previously dealt with this skill gap. Though a number of methodologies input has been received from multiple stakeholders including volunteers, board members, staff and members of the charity, as well as third party stakeholders.

Views from the stakeholders were varied, but all agreed that technology is a critical part of Wikimedia UK's activities and vision. Its application ranges from supporting day-to-day work, through supporting the volunteer base to flagship community projects. However, a number of weaknesses were identified through the life of the charity.

This report details the methodologies used, the results obtained and makes a number of recommendations. Although it is critical, this criticism is used to highlight opportunities to move forward.

Finally, I would like to thank everyone that took time to speak with me (through whichever medium) for your help in making this report possible.

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Aims & Outcomes

This report was commissioned to investigate how Wikimedia UK handles technology on an operational and strategic basis. It's an accepted fact that technology is critical to the charities activities, and that it has been a struggle to bring about an effective solution to all of its needs.

What is lacking is an understanding of all that has gone before, including both the good and bad, and a clear vision for improvements in the future. The aim of this report is to fill this gap in first relating the history of technology at the charity, reporting on the views of numerous stakeholders, and make broad recommendations going forward.

The outcome of this report will be a set of firm recommendations for the charity: both at a staff and board level. Following an implementation period (as yet to be determined) I have been asked to conduct a progress assessment and report on successes or failures.

Stakeholders

The first task for this report was to identify the diverse range of stakeholders. Beyond the volunteers, staff and WMUK board, there are very many areas that Wikimedia UK has interest. After some consultation I identified the following list:

- Volunteers
- Board
- Staff
- Technology Committee
- QRpedia Stakeholders
- UK Wikipedians (non-charity members)
- QRpedia users

Contacting this wide array of stakeholders proved challenging, and not all areas could be covered. However a wide sample of people were interviewed and this report reflects their views.

Methodologies

Several methodologies were used to obtain feedback. The primary method of communication was via email, either through mailing list posts or direct email. I started by inviting stakeholders to generally comment on technology in the charity. Using this initial feedback I introduced more specific questions to draw out opinions in more detail.

For some stakeholders, phone interviews were conducted to obtain more extensive and informal viewpoints. This provided a wealth of knowledge, particularly into the inner workings of the charity and the history of Wikimedia UK.

To fill out the views a survey was also distributed, with questions built on the comments previously recieved. It's aim was to try and draw out comments from individuals with less time for email/phone conversation. Although there was not an extraordinary response it did provide valuable insights.

My research focused on three key areas:

- The history of Wikimedia UK's handling of technology
- Suggestions for how to handle technology moving forward
- What projects the charity should be focusing on

In particular I asked questions such as:

- How important do you rate technology for the charity?
- How well do you think the charity handles technology?
- When involved in the charity, do you have an understanding of who manages technology?

Report

This report outlines my findings throughout this project. It reflects the wide ranging views of various stakeholders. I have attempted to bring together and summarise opinions with as little commentary as possible (my conclusions are detailed later in this report).

Wikimedia UK History

The history of Wikimedia UK's handling of technology dates back to 2011, when the trustees identified a need for technological support. Initial attempts focused first on hiring a Chief Technical Officer role and then a full-time developer. These were unsuccessful because the charity was not offering a wage commensurate with the position.

In response, the charity hired two contractors to bootstrap its technical needs. This solved the problem of technical capacity but left the issue of technical management. Existing staff members fulfilled the role alongside other duties, primarily Kat, but were not formally qualified to manage the contractors.

In 2014 the charity again attempted to fulfill the technical management role, but were unable to do so - leading to this report.

Day-To-Day Support

Wikimedia UK is a charity thay utilises technology heavily on a day-to-day basis. This can take a number of forms:

- Technical tools needing contractor support; e.g. civiCRM, mailing lists, OTRS
- "Regular" technical tools; e.g. Google Docs/Email
- Infrequent technical requirements; Sub-contacting development projects

Of these contractors provide support for the first, but there is no formal IT support for day-to-day activities (for example, trouble using email). This is provided informally through staff with technical experience.

The final item on the list refers to technical projects commissioned by non-technical staff; there is limited capability to plan projects and approve (or even write) technical specifications for such work.

Staff identified that they would like to explore a wider variety of options for their toolset. For example, OTRS came up regularly in discussion. It was thought OTRS had been chosen because it would be familiar to WMUK volunteers who already use the Wikimedia Foundation tool. In fact, few volunteers use the tool and it may not be the best for the job.

Projects

The charity has taken on or promoted multiple projects; QRpedia and the VLE. Over the course of several years the contractors have supported these projects (mostly with infrastructure) with some externally contracted development.

One set of questions posed to various stakeholders focused on how well the charity supported existing projects, and the scope of taking on other projects. The overwhelming response was that WMUK should look for other high impact projects to support, but that it should focus on effectively supporting existing projects first.

The VLE project in particular has been a difficult process; communication has been under-effective due to lack of technical management. The VLE contractor was not supported with technical expertise at early and mid-stages of the project. As a result the tool has not been fully launched and no clear technical scaling/support plan has been implemented.

Since taking on the QRpedia project the charity has implemented a privacy policy compliant statistics tool, but not really discussed any further development of the tool itself. There were

some complaints that the Piwik statistics tool was not suitable for institutions to use effectively, but discussions on a solution bogged down in details - no decision was made on what work to undertake. Most importantly, several people felt that QRpedia lacked any technical evangelist to promote it's possible uses (either in new venues or with existing institutions) and manage an overall technical/logistical roadmap for the tool.

Both the VLE and QRpedia are high profile projects for Wikimedia UK, and have suffered from a lack of technical management.

Other projects that have been proposed are WikiRate and the Accessibility project. Both these projects have struggled to get beyond discussion stages due to a complex decision making structure. In the case of the accessibility project, a detailed proposal was created but failed to find a technical evangelist to drive it forward. The WikiRate project has clear support for its goals, but has failed to find a place where a decision can be made. In addition, it is the sort of project that needs a solid technical specification to move forward - and the charity lacks the capacity to undertake such work.

Technology Committee / Members

There was a broad spectrum of opinion on the topic of the technology committee and the involvement of members in technology.

The technology committee evolved during a period that the charity was hoping to involve the community in more decision-making. It started as a closed group centered around a mailing list and irregular monthly meetings. Individuals with interest in particular ongoing projects (VLE, QRpedia etc.) attended as required.

All participants agreed the current format of the committee struggles to have impact; there is no clear role of the committee (operational or strategic). Further, there is no clear route to implementing any recommendations as decisions. Originally Kat acted as the conduit taking action points for approval and then assignment to various individuals, however her position in that role was only temporary. Chairmanship of the committee has been one complex point, with the role changing frequently depending on volunteer availability - this has led to governance complexities and hampered decision making.

Broadly, everyone agreed that the committee focused too much on operational matters. This appears to have been a side effect of lacking technical project management - with the idea that the committee would be able to fill the role. Alongside this, the committee discussed broader strategies (such as projects) and helped make decisions on behalf of the community (e.g. moving the Wikimedia UK wiki to the charities infrastructure).

Tom Morton Consulting, July 2014

It has been noted that the charity has a broad resource of technically minded members and volunteers - both with formal technical qualifications and the capacity for evagalising projects. However, it has struggled to motivate them to attend committee meetings or adopt projects. Efforts have been made to solve this by opening up the technical mailing list, with limited effect.

On the topic of the mailing list, it was pointed out that dialogue tended to spark up following committee meetings and died down quickly. There is no ongoing discussion amongst members.

Importance of Technology

Everyone interviewed agreed that technology was important to the charity. There was a broad opinion on the role of the charity either as a technical or promotional role - or both. It was universally agreed that WMUK has made good progress in fulfilling a technical role, but that a firm strategy for the next few years is still lacking.

Conclusion

Firstly, thank you to everyone who responded to my emails, phone calls and surveys. The overriding view was that Wikimedia UK is at a tipping point for technology. The charity is in a position to decide if its primary focus should be technology, or whether it is only a fraction of its interest.

A fully-functional technology stream is costly and time consuming to manage. There is intense appetite to manage multiple projects, but a significant body of work required to effectively approach and manage them. It is my analysis that the Wikimedia UK staff and board needs to agree a broad strategic approach to technology. From this, the charity can recruit staff and volunteers to fulfill the identified roles.

Below, I have made some broad recommendations that I believe will help the charity move forward in obtaining a full technical capacity. It has made some key assumptions about the focus of the charity; that it wants to develop and manage a number of front-line projects, support ongoing technical capacity in the office and involve the membership more directly. I have recognised that the charity has limitations in terms of budget.

Broadly, it is my belief that the charity should hire enough project management to support existing and future projects. That individual should be tasked with instigating a set of development projects through both contractors and volunteers, akin to the Wikimedia Foundation.

Tom Morton Consulting, July 2014

Recommendations

These recommendations are broken down into broad categories for implementation.

The boards role here is to publish a clear goal for the charity in terms of technology aims:

- The board to agree an overall technology aim/strategy for the charity for example, the number of front-line projects to support
- Identify ways to encourage participation of membership in technology projects

Staffing needs appear quite simple; fulfill IT support and technology management roles. However, in practice it is proving difficult to resolve.

- Write a clear outline of technology management needs at the charity (for example, a need to utilise volunteer expertise)
- Hire talent to fulfill the technology management role, previous attempts have failed so a new approach is needed. The approach chosen depends on the decision of the board as to the focus of the charity. I recommend one of three options:

Approach	Detail	Pro/Cons	Cost
Tech Liaison	Employ a member of the community, possibly part-time.	Represents lowest commitment to technology. Cheaper, fills the key skill gaps. Might be hard to recruit.	£20,000 - £23,000 pro rata
Contractor	Identify a skilled technical contractor with project management experience, for 1-2 days weekly (ideally non-remote working) to fill the role. Recommend approaching an agency for introductions.	Represents a compromise of commitment to technology. Expensive, comparatively. High skilled individual for less than full-time wage. Has the drawback of limiting how much support can be given to projects.	£450 - £1,000 per day depending on experience

CTO	Hire a Chief Technical Officer, second in command to the CEO.	Represents a full commitment to technology as the focus of the charity. Cost-effective way of achieving this commitment. Overall highest cost	£40,000 - £60,000 depending on WMUK salary scale.

Technology Committee

The charity needs to empower the committee to be a full advisory body:

- Remove operational tasks from the committee's remit and bring its focus on strategic matters and interacting with community.
- Agree a formal structure, with elected or appointed chair (the chair could be offered a small stipend during their tenure to overcome the volunteer nature of the role)
- Instigate a full decision-making path; technology project management staff role is to set agenda items and push ations through the following month.
- The charity should fund quarterly in-person meetings of the committee (probably in tandem with a board meeting)
- Empower the committee to conduct outreach into the community to pick up greater membership.