

SHAPING OUR PROGRAMME 2014-19

August 2014, Wikimedia UK is now entering a new phase in its development. We have come a long way and have the building blocks in place to move forward over the next five years. We need to reflect on what we are doing and how this will be shaped over the coming years. This report concentrates on next year with suggestions for the direction of travel in the years after that and how we can ensure we make the maximum impact.

A review of the Chapter with proposals for the programme over the next year and beyond that.

**Written by Jon Davies,
WMUK Chief Executive**

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Executive summary

The State of Wikimedia UK - A new phase for the chapter, implementing a coherent and effective strategy for 2014-19.

This paper outlines the state of Wikimedia UK, contains a brief history, an analysis of how we are delivering our programme and makes proposals for the shape of the programme in the foreseeable future.

Wikimedia UK is now entering a new phase in its development. We have come a long way and have the building blocks in place to move forward over the next five years. We need to reflect on what we are doing and how this will be shaped over the coming years. This report concentrates on next year with suggestions for the direction of travel in the years after that and how we can ensure we make the maximum impact.

This is intended as a paper for discussion by the *widest spread of our community*. This will then be considered by the CEO, staff and trustees. From this proposals from the CEO will go to the board in September.

Timetable

- Report published for discussion in August 2014 on Wiki via UK lists.
- Comments taken and revised report published by CEO for board discussion mid-September.
- Approval of broad plan reached by submission date of October 1st to the FDC.
- Report received and discussed at October Board meeting
- Revisions made up to end of financial year, January 31st 2015 based on Funding available and the reports on Fundraising and WMUK's IT development requirements.

Introduction

A brief history of our programme

In 2011 WMUK developed a programme of activities based on a combination of what we had been doing before the chapter employed staff, ideas from other parts of the movement and new projects initiated by volunteers and trustees. This was normal practice for the emerging chapters.

If we are honest what we did was not thought out sufficiently. While moving from a budget in the thousands to one in the hundreds of thousands we gave too little thought to the whys, whats and hows and whether what we did represented value for money. The board was occupied with many issues and not concerned with questioning the programme and given the early stage we were at this is not surprising. Our enthusiasm is not to be disparaged. We were very far from spending in ways that breached our charitable objectives or any charity law but we were giving far too little thought to outcomes and impacts. But perhaps this was inevitable, it is certainly a feature of all chapters of any significant size in their early years. The enthusiasm for new ideas and projects is part of what made Wikipedia possible and if we lost this we would be much the poorer.

We were, however, clearly aware of this and in 2012 we commissioned a [situational review](#) from Amida Consulting that stated very clearly the issues we were facing and repays another reading. It identified the issues clearly and we have made much progress since it was written.

The report identified these key issues:

- i. *An over reliance on a small group of core volunteers, and a failure to establish volunteer networks or grow volunteer numbers as expected particularly not for the "heavier" positions; leading to e.g. concerns about whether we will have good quality candidates for Wikimedians in Residence. WMUK lacks tools to measure whether we are succeeding in volunteer engagement. Key volunteers have sought paid positions within WMUK which could diminish our volunteer base and risk disappointing members.*
- ii. *Though the charity has about 270 members, discussions are dominated by a handful of vocal people, and often we have not listened to WMUK members, instead listening to 'community members'. Our culture is perhaps too 'wide open', when instead it would be best to be 'honest and friendly open'. We suffer from a culture of criticism rather than encouragement from some of our louder voices*
- iii. *Governance has been ineffective, attracted criticism and undermined reputation and, though now making progress still not fully resolved. Problems have included Board and Chair turnover, and lack of clear, timely, strategic decision-making from board; also micromanagement of staff. Currently there is a very heavy workload on Trustees.*
- iv. *On the whole we are not particularly good at producing verifiable plans of activities or measuring our impact.*
- v. *Limited number of new editors engaged and not tracking new editors engaged or following up*
- vi. *Slow to deliver on working formally with organisations, because of a lack of structure in how we manage the partnerships.*

vii. *The relative roles of board, staff and community are still not well defined and the balance between staff and volunteer ownership of delivering not found yet*

viii. *Inability to use its resources owing to lack of capacity – under-spending has meant limited delivery*

We have now reached a point where we have effectively dealt with most of the above. We have a clearer view of what our top line ambitions should be with systems in place to ensure consistent monitoring and evaluation. We have governance of a high standard. But we must take everyone with us. Our high level goals still need to gain buy-in, however good they are.

Should WMUK exist?

A startling question perhaps but one that gets asked. Chapters do not have a divine right to exist. We should remember this. Whether we can ever justify our existence in terms of brutal cost benefit analysis is more a question for the Wikitheologists than chartered accountants but I feel confident the movement in general recognises the need for local chapters. How comfortable some in the Foundation are with the presence of Chapters is another question and it is a case we need to keep making. At present, with a new Foundation Executive Director and a board that is becoming more proactive, everything is being questioned and ‘up for grabs’.

Why is WMUK needed?

We believe we can make good arguments for our existence:

- To sustain and develop the volunteer base in the UK.
- To provide local accountability to our activists in the UK.
- To act as a catalyst for UK based activities.
- To build high impact relationships with partner organisations in the UK.
- To raise local funding to support projects.
- To manage the reputation of Wikimedia UK and the projects through media and public opinion, providing a voice in the open knowledge debate.
- To influence policy makers in the UK.
- To work with other European chapters to influence the EU, and by extension world legislation.
- To be able to host movement-wide events.

Our next steps: planning and delivering a programme to meet our ambitions

WMUK has achieved a lot in the last two and a half years. There have been some extraordinary trustees, volunteers and staff. Much of what we do has worked and this is recognised by many in the movement who appreciate what we have achieved.

As a chapter we have:

- Continued to deliver a programme, much of which contains real merit.
- Created structures and systems that will prove future-proof.
- Maintained our community base.
- Built an international reputation.
- Employed highly competent and committed staff some of whom have become movement leaders.
- Overcome serious governance problems to become an example of best practice by other chapters.
- Taken a reflective view of our practice initiating reviews of our major work.
- Continued to experiment.

But we have been inhibited by:

- Not having to think too hard about money and getting value from what we do.
- Unrealistic ambitions e.g. Impatience to grow quickly.
- A scattergun approach to what we do.
- A programme based on 'tradition' and drifting from year to year.
- An *Animal Farm* culture of 'Volunteers good, staff bad'.
- Personal hobby horses from influential volunteers, staff and board members.
- Work that was not scaleable and could not be sustained.
- A lack of rapport between the UK Board and the Foundation, especially over governance and being independent fundraisers.

How do we compare with other Chapters?

In terms of reputation we compare favourably with the larger chapters, with other organisations looking to us for advice and support. In terms of size we are the second largest in terms of programme budget and staffing and as such need to be able to prove our merits more than most. Wikimania will enhance our reputation. On a historical note I visited Wikimedia Deutschland in early 2012. They had over twenty full time staff, extensive offices and a huge appetite for growth but were experiencing the same issues we have been tackling over the last year; what are we doing, why have we grown to this size, are we being effective?

Our growing pains have been replicated in most other chapters, particularly the tensions involved in transferring programme management from volunteers to professional staff and the development of a strategic board. I am confident that post Wikimania we will be able to demonstrate that we have made that journey with the minimum of disruption to our programme

activities. The final part of our governance review has now been commissioned and will report in December 2014.

It is essential though that we engage with our volunteers, re-engage with some who have slipped away, and build a significant growth in our active volunteer community. How we lure our 15,000 editors into becoming more active is a community-wide challenge but one we should relish and play a leading role in especially given the importance of UK based contributors. We are beginning to be clearer about what we want our volunteers to do but this still needs thinking about and clarifying. Wikimania has already helped us engage with Wikipedians who had hitherto not been involved with the chapter.

The FDC staff regard WMUK as doing well and making the sort of changes they hope all Chapters can achieve and the majority of colleagues in the Foundation regard us as stable and professional.

"Thank you for submitting this complete and detailed impact report, colleagues at Wikimedia UK! Congratulations on increasing the number of active volunteers. Wikimedia UK is finding ways to better measure more of its work, and is sharing important data like how files contributed are used, the number of articles created, number of files uploaded, quality of images, and whether new editors recruited through its activities are retained. While this information is very valuable, it is still difficult to collate across so many programs, so we appreciate Wikimedia UK is working on a more integrated approach to understanding these metrics across programs, much as you did with your program focus.

"Thank you for sharing numbers describing the outcomes of the microgrants you funded, including the usage of photos contributed through these activities. This helps us better understand the impact of this program on the projects. We also appreciated your observations around the results likely to be achieved from different types of grants: for example, contest grants versus book grants.

"Congratulations on hosting so many events in the past year. We hope Wikimedia UK is able to adapt its strategies in order to improve attendance at these events and get better results in terms of editors retained. We also hope to learn more about how the outcomes of events like the EduWiki conference move Wikimedia UK toward its goals around content and participation. Congratulations also on training 24 trained trainers through your trainer training. As you begin to start work in this area, we will be interested to see how Wikimedia UK is tracking what these trainees achieve over time toward Wikimedia UK's goals around content and participation.

"We are glad to learn of your successful work in Wales and in the future hope to learn more about how this work is related to your strategic goals. If the main goal of this program is to produce content about a specific region or range of topics, we hope to learn more about how this approach may be sustained or adapted to other areas. In the proposal form, Wikimedia UK identified keeping volunteers from burning out as an important concern. We would like to know more about

the strategies Wikimedia UK developed around this as a result of funding, and we hope to learn more about how Wikimedia UK engages volunteers effectively while preventing burnout.

"We are looking forward to better understanding the impact of your work as you implement more effective metrics and apply what you have been learning about which programs are most effective and how to your approaches. We hope your newly revised strategy and all of the work you have done to define your metrics and identify targets as well as stabilize the organization and governance structures pays off in the form of impactful program work.

[Winifred Olliff \(FDC Support Team\) talk](#) 23:26, 22 July 2014"

We need to transmit this confidence to the new Foundation ED and the Foundation board. But there are big questions being asked. Why do we need chapters? Why not fund volunteer projects directly from the Foundation? What can a chapter do that can't be done by the Foundation or independent groups of volunteers on the ground?

Wikimania will give us the chance to demonstrate how professional we are but most of all we need to demonstrate continuing stability. The scepticism from the outgoing Foundation ED about chapters will need to be countered.

Our five year plan

Having achieved agreement of our high level goals we have given the staff a better sense of purpose. We can ask the questions:

- *How does this project or activity fit in with our ambitions?*
- *How will it be measured?*
- *What do we expect to get out of it?*
- *What will the impact be?*

This has been very helpful and at least from a staff point of view created more certainty.

As a key to this we are establishing new systems for measurement and evaluation. This is making good progress but is not simple and buy-in, particularly from the volunteer community, has to be earned. For instance it has to become easy to set up events using CiviCRM and progress has been slower than we had hoped.

Long term-impact

Measuring something doesn't make it good. The Chapter needs to show it earns its keep. What can we do that is different, sustainable, extraordinary and builds reputation for the movement?

The initial analysis of the FDC shows little difference between small grant work directly from the Foundation and the work of Chapters. What are we doing that small groups cannot? Happily there are good answers. For instance a chapter can work with the big institutions in a professional and sustainable way that individual volunteers cannot sustain. This is a major strength and a universal truth of the voluntary sector that there comes a point when the scale of the work outgrows the capacity of its volunteer base.

What are our main challenges?

1. Reconciling the needs of our different stakeholders:

The Board of WMUK

Is ambitious to make our chapter the best. They naturally want to see the chapter working to its best advantage in a holistic way. This involves some quite delicate balancing of the needs of the other constituencies below.

The WMUK community

Want to feel that the chapter is working for them and being influenced by them. Given the diversity of the community, at least in terms of its views, finding consensus can be a recipe for stagnation and we can still fail to avoid outright hostility. At the same time, we often only get to hear the loud, most antagonistic voices in the community. As recent comments on forums have pointed out ‘our signal to noise ratio is not acceptable’. We need to grow in the confidence to do what we believe is right without being diverted or delayed. I believe the majority of our community will support this. They want the financial and staffing support they need to make their projects real.

The UK editing community

15,000 people in the UK edit regularly, yet we know less than 0.3 percent of them. They are major stakeholders upon whom the health of Wikipedia relies. They need to know what we do for starters and then offer their support. Recurring problems e.g. paid editing and measuring a volunteer simply by the number of edits they have made make it more challenging to build the community.

The Foundation

Wants evidence that what Chapters do makes a difference to its main concerns, principally reversing the editor decline. We need to be very energetic in addressing this issue through our activities. The coming year will see some significant changes to Wikipedia and its sister projects, mobile editing programmes are reaching new contributors, Visual Editor is likely to be rolled out and the design of the pages has been developed to make it more modern. We need to take advantage of these developments.

Our donor base

Donors have a mixed understanding of their support for Wikimedia projects/the Chapter and Wikipedia. On the whole we need to be much more robust at linking our impact to the encyclopedia and generally presenting our work as part of a local/global case for support linking through to en:wp. Work on refining an institutional case for support that can meet the needs of

different donor audiences (individual grant-making entities) will be important prior to the 2015-16 campaigns.

An important and developing part of our programme of donor stewardship is the move towards 'Friends of Wikimedia' and helping donors feel ownership of the work they have enabled and ability to be involved if they wish. Structured support in the form of a volunteer portal and/or VLE to teach editing skills remotely should be really important resources in achieving this.

Potential large funders

Need to understand how ambitious programmes can be funded in line with their charitable aims e.g. significant Wikimedian in Residence positions or large development projects. We also need to have inspirational pilot projects that will appeal to trusts and organisations looking to support the development of open knowledge.

Our users

A group that we neglect, and whose needs we need to explore further. Who are the readers of Wikimedia projects and what do *they* want? Are there improvements or initiatives that we could make to engage with them? How do we create projects of suitable scale to engage the readers and encourage them to become contributors?

Our staff

The staff represent our largest cost and biggest asset. There have been constant criticisms that they do not represent real Wikimedians but as we grow they become more and more representative of the community as many of them are drawn from it. There are also challenges to performance if they burn out from attempting to cover too much and the lack of focus contributes to this. Most of all they want to feel trusted and encouraged.

2. Creating a sustainable chapter

Growth

Do we have a vision for what growth we should aim at and are we willing to accept the consequences? The days of '*Grow like Germany*' have long gone and our FDC funding is almost at a standstill. We must develop more capacity through a growing volunteer community but for major impact we will need more funding. We have had to turn away good opportunities through lack of staff capacity that might have proved more impactful than other programmes we pursue. My proposals offer a more solid managerial base with the energy for growth depending on external partnership and fundraising opportunities.

Management challenges

Getting the best from staff needs sufficient management support time and we don't have this. We are managerially too thin. Posts have been created but we are struggling to ensure all staff have enough support and direction. We have grown very quickly and some devolved management has been achieved but this is now an issue that demands urgent attention and some modest adjustments. It is addressed below in my proposals.

Value for money (VFM) - how do we need to regard this?

Absolute success in this respect is probably impossible given our mission. How can you value in financial terms a page on Wikipedia or an image on Commons? What we can do is demonstrate that we offer the best value for money possible in comparison with our peers, that we don't waste funds, and that we think carefully about our programming and seek to get as much impact from it as possible. An absolute definition of VFM is hard to achieve but we will be compared with other chapters so we need to be smart about this.

Delivering activities vs. reporting bureaucracy - getting the balance right

We need to be very careful we don't spend all our time '*weighing the pig, rather than feeding it*' as the Welsh saying goes. We need to make sure our reporting systems are not repetitive and burdensome. We have competing audiences with the FDC, the Board, our UK community and the Wikimedia community in general. Additionally, with increasing ambition of seeking external funding for our projects, we need to be able to report back to a variety of funders.

It is not good VFM if our systems create duplication and produce material that is seldom accessed. We create a mass of information that is never read. We are working with the FDC to improve this and making good progress that could have an international impact.

Volunteer activity vs staff activity

How do we get the balance right? Essentially how do we make sure volunteers don't feel stifled or marginalised while making sure staff keep the chapter's day-to-day operations on track? The development of committees has demonstrated how challenging it is to have programme work run by volunteers without staff support. We really need fresh energy and ideas. My proposals seek to defend funding for community based activities but we will need to see significant growth in our volunteer community.

3. Delivering an effective programme

Our new systems of measurement and evaluation will give us a more accurate picture of how our activities perform and are creating baselines that will be drawn upon in the future.

I believe strongly that we need to let this year develop with a view to re-modelling our programme in 2015-16. We can't keep pulling the plant out of the flowerpot to see how the roots are doing! This year represents a significant change in the way we have monitored our work and recorded our impact. Our Q2 reports to the FDC are demonstrating our effectiveness. We will certainly need to change budget allocations and priorities. But a quick overview is useful:

Current activity area	Is it effective?	Does it offer sufficient impact/Value for money?	Which strategic goals does it address?	What should we do?
Volunteer support activities	Extremely varied results. Good overall engagement but poor follow-ups lead to minimal outcomes and poor impact. This is a universal problem in the movement.	Modest cost so does represent good value for money. Has traditionally underspent and this needs addressing.	The activities aim to support Wikimedia community- skill, diversity, thriving community (G2a.1, 2a.2, 2a.3).	Ensure proper monitoring happens through simple systems but aim towards volunteers self-organising so can scale up as volunteer capacity grows.
Wales local activities	Good outputs and outcomes with strong evidence based impacts	Yes and a model for work in Scotland.	Strong on building local partnerships, increasing and improving content as a result of these (all of G1).	Continue building our work in Wales. Commit to permanent post. Seek further opportunities for outside funding.
Scotland local activities	Potential for Welsh impact. Slow burner at the moment.	Low cost so good value for money. The Wikimedian in Residence post has started to create impact.	When developed, it would aim at partnerships and content, but also growing the volunteer community (all of G1, all of G2a)	Allocate modest resources. Ensure regular activities there as volunteer community builds up. Seek opportunities for outside funding to support project work.
Project grants	Often effective in themselves but take up has been slow.	Varies but generally such modest cost that not an issue.	Varies depending on the grant focus - often content (G1.1 or 1.2) or raising awareness (G3.2).	Continue the programme but without a predicated amount. In reality less needed as we currently operate. Seek to expand the numbers of those who can access it. Learn from the Individual Grants at WMF.
Travel grants	A popular item and builds relationships with community.	In terms of community coherence, development and wellbeing and spreading WMUK influence.	Varies depending on the event travelled to, and the function of the grantee. Important for sharing knowledge with other chapters	Continue. Make a significant contribution to WMUK presence and volunteer development.

			(G5.1, 5.3). Can also address free knowledge advocacy (G3.2).	
Wikiconference UK and AGM	No - has been too small and insular.	Has not been expensive but has eaten up staff and volunteer time.	In 2014 planning to address G2a.1 and G2a.2.	Needs to be dramatically revamped for 2015 with much broader reach. At the moment very lacklustre and not impactful.
Wikimania 2014	We are confident that we will be able to gain substantial benefit from the event.	Almost certainly. The funds allocated will be high profile and build capacity for the chapter for future years.	Note we are distinguishing between outcomes from Wikimania itself, and the outcomes for the chapter (focused on building partnerships, growing volunteers, supporting other chapters and other open knowledge groups - G1.3, 2a.1, 5.1 and 5.4).	Carry out the plan and ensure the follow up activities are sufficient to build for the future.
Train the Trainers	Our evaluation and the growing number of people used for our activities proves its worth.	Grows in value as the months pass and the unit costs of training vs events-served reduces.	One of the key areas where we provide skills training for the volunteer community - G2a.3.	Continue with a view to spreading geographical diversity and ensuring skills remain fresh based on the review's proposals. The results have been good and we can offer partner organisations a level of quality we can be confident in. Strong need for better support materials.
Development budget including supporting community	Has not taken off yet owing to lack of staff capacity but scoping exercise will determine way ahead.	The spend to date has been mainly on contractor technical support with the exception of work on the VLE. Other projects, QRpedia for instance, have been achieved by volunteer engagement.	Key for our technical development - G4.1 and 4.2. In the longer run, with creating new technological solutions, will increase access to open knowledge (G3.1).	Massive potential for success with external funding and strong impacts. A clear plan needed and will have to be sustainable and over a sensible timescale. Scoping review reporting shortly.
Merchandise & publications	Popular with our community and visitors.	Relatively low cost for impact as measured by reach of our materials.	Most directly to support raising awareness of open knowledge - G3.2.	Continue with extra resources dedicated during Wikimania.

				We need editing packs, posters etc for anyone or any group who wants to have a go. T-shirts etc to reinforce volunteer contributions.
Extended reach	A vague programme area that is dedicated to groups and areas not well represented.	In general has been under-spending but represented some real achievements with low cost e.g. Ada Lovelace which enhanced our reputation as a chapter.	Key for G2a.2, and also contributing to 1.1, 1.2 and 1.3 via editathons with partner institutions.	Better focus for office based activities with encouragement for volunteer originated work into a common budget. Staff need to target priority areas, e.g. Scotland addressing our diversity goals, volunteers to complement and support this.
GLAM outreach and events	This has offered us some high profile successes, but Impacts have been limited and not sustained in some cases. There have been technical challenges that have hampered the work.	The costs are modest but if the outputs could become sustained and enjoy the requisite technical support, the value of the work would increase significantly.	Key for content and building partnerships (all of G1). Additionally awareness raising by presence at sector conferences (G3.2). There is scope for supporting volunteering (G2a.1).	Activities need to have much more of a long term impact. Reputational impacts are very good but we also need to deliver sustainable involvement in areas such as new editor development. With the upload and metrics tools working, need to start making more use of it. Potential to influence policy in the cultural sector hasn't been explored outside of WIR programme.
WiRs	Excellent profile for the charity and this must not be underestimated in terms of building reputation for Wikipedia. Local impacts and legacy much more limited, although some residencies delivering very impressive projects and changes within host organisations.	Quite expensive for the achievements that can be demonstrated. Better metrics can help counter this. Has been a significant source of co-funding.	One of the key programmes to support content and partnership building (G1). Advocacy for open knowledge can lead to policy changes within host institutions (G3.3).	The review says we need much longer relationships to get full value with clearer expectations. We need more staff time to offer proper support. We need to find shared funding opportunities or more 100% externally funded posts.
University and education Outreach inc	No. Too broad and ill-focused. Trying to do too much. e.g. supporting Wiki societies at universities.	Wikimania may up the ante on this but we are not seeing the benefits we need from what should be a core part of our profile.	Similarly to GLAM - content and building partnerships (G1). Additionally awareness raising by presence at sector conferences (G3.2).	Education needs a complete re-think. The JISC work was excellent but we have seen little connection to our work and the legacy for WMUK may be minimal. Huge potential for influencing education policy

				<p>We need to think about impact on the UK and how we work more closely with the worldwide movement. Significant funding could make a huge impact.</p> <p>In 2015-16 will narrow focus to ensure maximum impact in the University sector.</p>
Education conference	Works as a focus for our community but not sufficiently thought out or with a long term goal.	Not expensive and quite high profile but must deliver more as it takes a significant amount of staff time.	Widespread - building new partnerships (G1.3), involving diverse group of volunteers (G2a.1, 2a.2), engaging other chapters (G5.1).	After 2014 work out how this could reinforce the rest of the programme rather than being a standalone event. If not scrap it or find external sponsorship.
Pathways project	Had clear goals and achieved them with added links being created with excellent prospects for the future.	Yes. Especially given the matched funding elements.	Fits strongly into content creation and improvement (G1.1, 1.2) and building volunteer community (2a.1 particularly).	This will form the foundation of our future work in Wales. It will hopefully be emulated in other shared projects.
Fundraising costs	No. The role has been sidelined by a combination of preparation for independent fundraising and associated IT issues.	The work has been vital and essential but now needs to develop to mainstream fundraising.	Covers the whole of G2b.4 area.	<p>The issue of fundraising via banners, at least for the next year is now clear. A programme based on diversification and fundraising for specific projects is being drafted..</p> <p>More capacity needed if our ambitions are to be achieved. Admin support may help elevate more ambitious outputs.</p>
Building open coalition	After a very gentle approach we now have this going forward with the new post.	In terms of potential this should be a very good investment.	Addressing awareness (both G1.3 and 3.2) and, crucially, working with open knowledge institutions - 5.4.	Need to be prioritised, especially in terms of maintaining the liaison post we host. The national and international impact could be substantial.
EU advocacy	An area we have hedged around for years	We now have a handle on this with the support of WMDE.	Aiming both at raising awareness of open knowledge and facilitating policy change (G3.2,	For modest staff and volunteer effort we can harness a great deal of impact from this work.

			3.3) and collaborating with other chapters, G5.1.	
International chapter's support	We have done well with this and must continue given our position in the movement.	Has been expensive, e.g. governance workshops, but highly influential.	Key to address the international chapter work (G5.1, 5.2 and 5.3).	Need to continue, in the aftermath of Wikimania, to build our reputation, especially with a view to supporting smaller chapters if we are to play the role we claim. Will require lower resources than in Wikimania year.
Communications budget incl Annual review	Comms in general stretched too thinly and needs focus. Review of expectations of the post useful, including delegating some elements such as blog and social media in order to focus more on press and public advocacy.	Yes - absolutely vital especially when dousing reputational fires.	- operational	Impact on UK attitudes could be significant. Need much better outward facing aspects e.g. WMUK website. The foundation seems to have realised the worth of this work after earlier nervousness.

For detailed analysis of achievement against our strategic goals of programme work visit

[Impact Report for 2013-14](#)

[Q1 Report to the FDC from WMUK](#)

Q2 Report to the FDC from WMUK - to be published before August 30th.

Overarching principles:

Maximising impact

Demonstrating maximum impact in everything we do through consistent measurement.

Letting the UK know we exist - increasing the publicity for what we do.

Building our reputation

Building project reputation - working with the good and the great to demonstrate the quality and worth of our projects.

Longer time scales

Working in the longer term for better effect - thinking of projects in terms of years not months to gain maximum effect.

Independent fundraising

Looking for major partnerships to make big differences.

UK based projects

Taking advantage of the cultural and historic gravity of the UK.

Work with umbrella bodies to change culture and make partnerships.

More flexible budgeting

Continue to broaden top budget lines to allow more flexibility within our year and take advantage of opportunities.

Demonstrating Chapter impact

Showing the importance of local chapter in delivering impact at a national and local level.

Big picture lessons

Reflecting on our performance overall during the last two and a half years I conclude that:

1. We are still trying to do too many things.
2. The scattergun approach, certainly for major office-led projects does not allow for enough project development time.
3. We need to integrate our programme within itself more to avoid bunkering e.g. accepting an event can cross 'education', 'Glam' and something else all at the same time.
4. Our relationships with partner organisations are, with several notable exceptions, often too short and need to develop over years not months if they are to be of significant impact.
5. We need to offer partner organisations more support to get maximum effect.
6. We need to be asking more from partner organisations in terms of shared funding and resources.

7. We need to be much more strategic in how we choose our partners. What will be the reputational impact? What will be the actual outputs? Will there be long term benefits?
8. We need to be more outgoing in terms of relationships with sympathetic communities. With constructive external partners we can achieve so much more.
9. We need to position ourselves as a significant voice for open knowledge in the UK.
10. We need to be at the heart of open knowledge advocacy in the EU.
11. Self-evaluation is one key to what we do and can help inform the broader community.
12. We should be using our knowledge of the UK to run a national campaign to engage with our editors, re-engage with past editors and encourage new people to edit. Visual Editor will assist with this.
13. We need to be better at telling our stories of success. Our recent publications and Wikimania will offer a boost to this but it needs to be reinforced through an increasingly proactive communications strategy both externally and internally.

But one plea. We must avoid trying to change everything at once. We need to evaluate and measure our programmes of course but we need stability over the next year if the changes we make are to be effective and enduring. We may not be an oil tanker but we are quite a large vessel and any changes in direction need to be done with care. 2015-16 will demonstrate the maturity of the chapter in being able to differentiate between the effective and ineffective while ensuring room for imagination and experimental development.

2016-19 will allow us to develop further, growing strong in our overall programming but developing our specialities as a contribution to the whole movement.

Using our high level goals

One advantage we now have is a set of [high level targets](#) that reflect our vision, values and mission. They have proved an invaluable tool in monitoring and measuring our outputs and impact. The strategic goals have only been in place for months but we are beginning to get a feel for the challenges they represent and the gaps in our programme we need to address.

There are five Strategic Goals that fall within our [Mission](#), and below is their broad assessment to date:

- **G1 Develop open knowledge**

A general aspiration that our programme activities all contribute to. Particularly important are GLAM (also via Wales and WIRs) for media uploads and Education activities for producing Wikipedia content. This needs to continue to be strong as it may be one of the measures we are compared with against other chapters.

A distinct area in this goal is G1.3 - partnership building, where we are building our reputation as a key open knowledge organisation to work with. We have been improving our position via successful projects with respected partner organisations - most staff work on building partnerships within their roles.

- **G2 As a volunteer-led organisation, ensuring effective use of the resources available to us:**

- **G2.1 Develop, involve and engage WMUK volunteers**

We need a better and more targeted strategy to broaden our appeal to volunteers and especially engage our contributor base. The diversity of our community needs to be developed. There has been a steady increase in our volunteer base but this needs to develop much further, especially building leading volunteers who can take on projects. We need to develop their skills and confidence.

- **G2.2 Use effective and high quality governance and resource management processes**

We continue to make good progress on this. The final part of the Review Trilogy is now about to start. In the light of the decision on independent banner fundraising we are re-building our fundraising strategy to reduce our reliance on FDC funding. We have also been making progress on the monitoring systems within the chapter.

- **G3 Reduce barriers to accessing open knowledge**

Note that this goal is broad in remit and will continue to be defined more closely. It aims at two areas. 1) Raising awareness (reaching overall public and also working towards policy change). This is a result of an assumption that more awareness will eventually increase people's access to open knowledge. 2) This goal also talks about more practical increases in access of Wikimedia projects, e.g. by QR codes - some technical innovation is involved here.

On 1), good progress was made in establishing links with fellow open knowledge organisations in the UK and EU. This cannot be allowed to drift as it is a long-term strategy where consistency and persistence win the prizes. 2) has been more difficult to attain.

- **G4 Encourage and support technological innovation**

Wikimedia UK is well placed to offer technological innovation as a solution to many of its outreach related outcomes. Whether editor recruitment and retention (VLE), developing open knowledge (Voice Intro Project) or supporting governance and movement evaluation outcomes (Civi CRM) the chapter has already taken steps to explore how software design can support real-world outcomes.

There is a considerable appetite to escalate the chapter's spending and delivery of these types of projects, as well as more ambitious R&D that could deliver movement-wide tools with valuable impact (WikiRate) A continuing blocker has been a lack of technical expertise on the staff team and staff and volunteer capacity to support a strategic programme of development. This will require additional spend before the end of 2014 to address and lay the foundations for seeking funding to support expanded capacity - both volunteer and staff.

- **G5 Develop, support, and engage with other Wikimedia and open knowledge communities**

We have been very successful with this and Wikimania will prove a useful venue for testing existing links and developing new ones. We have the huge advantage of being native English speakers and so our materials travel more easily than most in the community. We are also geographically well situated in terms of transport hence the many visitors we receive. The work of Open Coalition showed that there is a gap in communication between various open knowledge organisations, and we can help to bridge it.

For detailed analysis of achievement against our strategic goals of programme work visit

[Impact Report for 2013-14](#)

[Q1 Report to the FDC from WMUK](#)

Q2 Report to the FDC from WMUK - to be published before August 30th.

Of course many of our programmes cross goals and all goals are not equal but whatever we do over the next five years we will be using them as our touchstone. It needs to be noted that the Foundation is also evaluating its future and the community as a whole and will come up with its own targets despite abandoning any idea of a five year plan. I am fairly certain that our aspirations will match their overall goals.

This also needs to reflect our work with other Open Knowledge organisations.

Planning ahead

We need to present a plan to the FDC, from whom two thirds of our funding comes for 2015-16, by 1st October. This needs to define how we anticipate our programme and spending to look. This should not limit our ambitions. Fundraising and finding funding partners can extend the range of what we do, but we need to be realistic.

I anticipate ending the financial year 2014-5 with sensible financial reserves unlike in previous years where we have struggled to spend our budget.

Wikimania has made it a really unusual year with spending spikes and activities that we would not normally undertake. We have however sought to integrate our Wikimania participation into our main programme ambitions.

I am anticipating a core budget next year of around £740K based on continuing UK income and a settlement from the FDC of a similar amount to the previous year. This is similar to this year but will require a coordinated effort to attract funding from external sources - both grants and direct donations - rather than drawing from reserves as in previous years.

I would hope that our re-invigorated fundraising work can help replace the funding that in the past two years we had taken from previous year underspends.

Eleven point plan for 2015-19

Having talked to staff and board members I have these proposals for how we plan the programme for the next year with ambitions for additional growth where it becomes possible.

I suggest we combine an approach where we move forward cautiously based on our learning but offer the flexibility, through finding extra resources, to develop new programme strands.

	1. Supporting community activities
2015-16	<p>We need to continue to have sufficient budget to support the work of our volunteers through small grants, travel grants, events, equipment support and training. We will assess the exact amount based on the 2014-15 demand but commit to revisiting the amount mid-year should extra resources be needed. Impact analysis of grants would also offer information on what we should focus on.</p> <p>We will seek to offer technical support for setting up and monitoring events in order to reduce the burden on our volunteer community. We will use our technical systems to offer support and follow-up to all new participants and volunteers to ensure their continued participation in our activities.</p> <p>It is also important to keep supporting the diversity of the volunteer community.</p>
2016-19	<ul style="list-style-type: none">• Running individual grants for promising, experimental projects• Try building 'role profiles' and recruit volunteers for some public facing outreach work• Build resources for volunteers to be able to deliver their projects (e.g. training portal with lesson slides, information etc)

	2. Education programme
2015-16	<p>We have had some success with our Education conference and our work in Universities. The Wikimedian Ambassador in JISC was very successful and had an impact - cultural change - that will see play out over the coming year.</p> <p>We cannot continue to confine ourselves to the university sector and need to test the water in at least two other areas of education. Low hanging fruit might be Lifelong Education and organisations such as University of the Third Age. We should consider</p>

	<p>pilot projects of significant length in these areas with the possibility of finding funding for expanding these opportunities.</p> <p>The Education committee has no shortage of ideas.</p> <p>Our current Education organiser (part-time) will focus on making a maximum impact in Higher Education and other staff will see pilot opportunities to extend our work in education.</p>
2016-19	<ul style="list-style-type: none"> • Deliver work via high level partnerships - e.g. training centres, overarching educational bodies • Pilots in areas related to our mission - e.g digital literacy, education projects in education at a broader level. • Make sure Expert Outreach (e.g. learned societies) stays on the radar

	3. GLAM programme
2015-16	<p>We will continue our work with GLAM institutions, particularly through Wikimedians in Residence but also through smaller volunteer-led initiatives. We will seek greater leverage through the use of umbrella organisations.</p> <ul style="list-style-type: none"> • We will increase our presence in the sector by attending relevant external conferences • Start regular use of GLAM tools for upload and metrics to allow for simple and trackable media donations. • Europeana begins to make an impact with its mass upload tool. <p>The new programme support post will support this work.</p>
2016-19	<ul style="list-style-type: none"> • Aim for culture change in the sector - work with umbrella organisations/government (the funders of the GLAM institutions) • Leading on advice about reusing material for GLAM institutions in the UK

	4. Wikimedians in Residence
2015-16	<p>Following the recommendations of the review we will seek longer but fewer residencies based on the highest possible impact and find capacity to offer more support to those in post and their institutions.</p> <p>We will seek further residencies where they can be funded by third parties or the institutions themselves.</p> <p>The new programme support post will have support for Wikimedians in Residence as a key role, and pick up on the actions identified by the review document.</p>
2016-19	<ul style="list-style-type: none"> • Look to embed WIR work as element of staff's jobs • Develop more umbrella advocates for open knowledge and media donations - especially if supporting the major partnerships work

	5. Fundraising
2015-16	<p>We will use our local knowledge and fundraising expertise to pilot funding partnerships for high impact projects that can extend the work of the chapter and its influence. We will be looking for funding from major trusts and sympathetic organisations to create projects in the Education, GLAM and Development sectors.</p> <p>My initial proposal will be to see how the experimental split of roles between major funders (Fundraising manager) and our donor community (Fundraising support assistant) works but by December 2014 be in a position to assess whether the creation of the support post should be made permanent.</p>
2016-19	<p>These years should be used to develop both individual giving and partnerships and grants as income streams, reducing our reliance on FDC funding from the current 55% to around 35% dependent on our overall budget growth. In order to achieve that we need to be bringing in around double the current income from external sources, presumably with a steady growth in individual giving and grants and partner funding in a 1:2 ratio. This can be delivered without large increases in staff, by maximising all staff pursuit of funding relationships and judicious spending on specialist support rather than in-house teams for campaigns activity.</p>

	6. Regional work
2015-16	We will continue to have a full time organiser in Wales and work towards finding funding for one in Scotland. We will continue to seed work in Northern Ireland.
2016-19	We will seek funding support from the regions to establish staff and if possible bases as a centre for WMUK partnerships and volunteer activities and support - this will help to account for regional differences in e.g. education structure. At the same time we will need to be careful to keep our messaging and approaches similar across all regions.

	7. Building the open coalition
2015-16	Key area for G5. We have begun to build on our relationships with other open knowledge organisations through our part time post. We are creating outcomes through shared activities that can have an impact on policy makers and public opinion formers. We should seek funding to continue this post but if not available continue it from our own resources until support can be found.
2016-19	<p>Through external funding this post should become permanent - whether hosted at Wikimedia UK or at external organisations on a rolling basis. Office space to always be available for the Coalition. The network, with WMUK at its heart, is substantial, outcomes in terms of collaborations, knowledge sharing and Coalition membership as well as joint projects, funded by external sources or joint Coalition partner funding. The Coalition will continue to work with partners to produce materials which give insight into how to use open practices and best practice - these are to be shared with organisations outside the movement to grow the understanding of the value of openness beyond the usual players in the open sector.</p> <p>The Coalition will have a clearly stated and publicly articulated strategic plan, which correlates to the funding runway.</p>

	8. Supporting the international community
2015-16	Key area for G5. We have made excellent progress in this playing a full role in supporting other chapters and working closely with the Foundation, for example through active engagement with the Wikipedia Education Collaborative to provide a support network for global movement efforts in that specific area. This should continue through financial support, sharing expertise and members of our community building relationships.
2016-19	We should learn from WMDE who have run movement wide conferences, meetings and initiatives - they provide opportunities for other chapters to learn and network. We could look at buddying developing chapters.

	9. IT development
2015-16	Key area for G4. We have commissioned a review of our development capacity and potential. Without prejudging the review but bearing in mind our high level ambitions we will need to bring in the capacity to support our growing in-house technical needs, the building of proposals for larger development projects of international significance and the knowledge of how to find funding for such projects.
2016-19	Progress will be informed by the review document's recommendations. WMUK could develop a portfolio of IT projects. Some will be of significant international importance, others aimed at a more UK focus.

	10. Building major relationships
2015-16	Building relationships with major organisations is time consuming and requires attention to detail and diplomacy. Needs judgement to decide who to work with. We need to consider how to configure our staff to allow this to happen most effectively – has often been run via WIRs so far. My proposal is to use a current staff member to take on this high level role and continue to lead on evaluation. The new role, Programme Support Manager will work

	with staff to support the current work on the ground and support the Wikimedian in Residence programme as proposed in the review. This will Require some redistribution of funds but can be met.
2016-19	<ul style="list-style-type: none"> • Seek co-funding for projects as a part of the partnership work. Multiple stakeholders require more coordination time, as some WIR experiences show. • Use as a chance to reinforce other programmes - Education, GLAM, Extended Reach. Major partnerships with umbrella bodies could help us influence many organisations in the sector (e.g. Jisc now gives advice on working with Wikimedia to organisations that get in touch with it).

	11. Advocacy
2015-16	Advocacy is a growing and important area of work for the charity. We will continue to become recognised in the the open, tech and education sectors, as well as with policy makers and opinion formers. This is important both locally and domestically. We build on our engagement with bodies such as Parliament, the DCMS and the IPO. We will continue to seek appropriate speaking slots at high profile conferences. We will continue building relationships with MEPs and relevant MPs. We will continue to support the Open Coalition, whether through funding or, preferably, as a key partner with funding coming from elsewhere. We work closely with our partners in the FKAGEU. Our aim to instigate change.
2016-19	Over this period there will be a continuation of our work and we can begin to see our influence grow. We will be a contact of choice for those policy makers in the fields of open, tech and education. We will begin to see wider acceptance of open licensing, open content and greater understanding of the impact our projects have as educational tools. We will begin to see the regulatory framework relating to copyright and public domain licensing move in our favour.

Managerial changes to improve our impact.

To change the focus of our programme to support our programme work better, see a step change in our Development work and bring in the extra capacity to ensure we reach our external funding targets we will need to make some staffing adjustments.

It is very easy to forget how good a staff team we have and how well they have delivered our programme. We have our weaknesses but nobody can point to a lack of enthusiasm or

commitment. My proposals are intended to provide more support for areas that need it to allow the chapter to continue its development and work towards its independence.

[A revised organogram can be seen here](#)

Maximising our activity impact.

As I have commented the management system has become thin and too compartmentalised. We need to think more about the scale of what we do rather than create bunkers. Where for instance do Learned Societies sit? With Wikimedians in Residence spanning Education, Glams and Learned Societies should they not be supported in a consistent way?

I propose that we look at our activities and divide them into two areas for project management.

Firstly a **Head of major partnerships and evaluation** - the member of staff would be responsible for developing and supporting the major partnerships, including supporting the fundraising organiser in finding the funding prospects we have and need to develop for maximum impact over the next five years.

The postholder would develop the extension of our Educational Work outside the Higher Education sector.

Secondly appointing a **Programme Support Manager** - this will include volunteer activities, whether led or supported by staff, editathons, training, smaller collaborations and regional work. The member of staff, a new post, would manage and support these activities and report to the Head of major partnerships and evaluation. This post would also specialise in managing and supporting Wikimedians in Residence as per the recommendations in the WiR review. This would offer more managerial supervision and direction and remove the bunkering in this area.

This would be intended to increase the impact on our community programme.

The funding for this adjustment would largely come from existing programme budgets but should mean we can leverage external funding from our work that will compensate for this.

IT Development capacity

This report will have to be a limited analysis pending our commissioned review but we have been underperforming. Day-to-day technical support has become more demanding as our administrative and monitoring systems have become more sophisticated but we have coped using external contractors. Resources for Wiki based development, such as the Virtual Learning Environment (VLE) or Europeana have been insufficient and progress has been too slow. In addition we have a wealth of ideas that don't have anyone with the technical expertise to assess and prioritise. I expect the review to address these issue with an expectation of more resources being allocated to this work.

Fundraising

I write this before our review of fundraising is anywhere near complete, Katherine is currently still taking evidence, but I am anticipating a need to extend our activities with a concentration on major funding opportunities and working with key staff to leverage more funding opportunities for our programme e.g. software development to achieve strategic aims and outreach to diverse audiences. This would inevitably require more investment. The temporary fundraising support post will be closely monitored. It is possible that the Fundraising review will see merit in increasing our fundraising capacity in which case such a role might be considered.

Open sector advocacy

We currently fund a six month part-time post co-ordinating a project called the Open Coalition. This project is funded by Wikimedia UK, although the role works on behalf of the whole open sector. The project was initiated after Stevie wrote a proposal for our Board to fund it for six months, which they accepted. The post holder is Bekka Kahn.

Work is progressing well and there are already several individuals and organisations joining the project to undertake useful collaborative projects. The high level ambition is, as Stevie says, “to make open the new green”. By showing sector leadership and funding the post first, WMUK has demonstrated a real commitment to the open movement. I would propose making this a permanent part time post because results have already been impressive and the Coalition offers great promise for culture change. It is preferred that funding is found from Coalition partners or other funders to support the work but if none is forthcoming Wikimedia UK should continue to support the post for another year (on a rolling six monthly basis).

European advocacy

This is an area of great opportunity for the chapter but has to be balanced against the lead time of the work. Change will never come immediately, either at national or European level. But we must continue to make the case strongly for open content and open knowledge. As a founder member of the Free Knowledge Advocacy Group EU, WMUK is showing sector leadership. In terms of sustainability we are lucky to have an outstanding Wikimedian in Brussels but WMDE would like some support in terms of the heavy lifting. We should offer what support we can - and this doesn't just come down to financial support.

Budget implications

Income for 2015-16

My best guess for our income for 2015-16 will be:

FDC allocation	Small increase on 2014-15 (353K)	360,000
Regular donations from WMUK donors	Sustaining through low attrition rates and increased monthly amounts from some donors.	250,000
Gift Aid and other income		30,000
Major fundraising		110,000
Expected total		750,000

This will depend on finding external resources but will mean not drawing from our reserves unlike in previous years.



Figure 1. The December 2013 Wikimedia UK board meeting. Photo by Katie Chan. Licensed CC-BY-SA 3.0