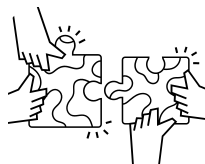


[GSF v3] Final or yearly reporting form for Gener...



WIKIMEDIA GENERAL SUPPORT FUND

FINAL LEARNING REPORT FORM AND YEARLY LEARNING REPORT FORM FOR MULTI-YEAR FUNDING AFFILIATE REPORT FOR WIKIMEDIA AFFILIATES

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Per the recent update on the Wikimedia Foundation Affiliates Strategy process, Wikimedia Affiliates that are General Support Fund grantees will fulfill their affiliate reporting requirements through their final or yearly grantee report.

If you are a Wikimedia Affiliate, you will use this form for your affiliate reporting and to address the affiliate health criteria. You do not need to submit a separate report to AffCom. Follow the guidance in the **green boxes** to report on how you met the corresponding affiliate health criteria.

If you are not a Wikimedia Affiliate, aligning your responses with the affiliate criteria is optional and not required.

[Learn more about affiliate health criteria →](#)

Part 1: Your work and learning

A. Is this report for a multi-year fund? Required: Select one option. Yes/No

If yes:

A1. Select the year for which you are reporting.

A2. Select the year of funding for your multi-year award.

Please note that you will need to use this reporting form for your yearly activities. A year is considered 12 months after your grant start date. For example, if your reporting period is July 2022 - July 2023, select the start year of the reporting period — 2022. Required: Select one option.

For affiliates, use the following space (Question 1.) to address [Affiliate Health Criterion 1.1 \(Goal delivery\)](#). Describe how you actively delivered on mission goals, e.g. content creation.

1. Please share to what extent your programs, approaches, and strategies contributed to addressing the challenges you shared in your proposal. If they did not contribute as you believed they would, please share what obstacles you faced and what, if anything, you learned from them? (required)

Do not go into too much operational detail about the work. The intention of this report is to focus on learning from the methodologies and approaches as you are implementing them. Try to focus on reporting some of the key processes and factors that contributed to achieving your outcomes.

For multi-year yearly reporting, focus on the activities and strategies implemented in the year you are reporting, not the cumulative period of your grant.

2. Is there a plan to build on the key successes you had? If yes, please describe the plan and if no, please share the limitations to do so. For instance, did the activities lead to any new priorities, ideas for activities, or goals for the future? (required)

Here, you can detail some of the learnings that you found particularly effective and why.

Imagine you are teaching a newcomer about all that you learned.

For multi-year yearly reporting, focus on any learnings for the year you are reporting.

For affiliates, use the following space (Question 3.) to address [Affiliate Health Criteria 2.1 \(Affiliate health & resilience\)](#), [4.1 \(Internal engagement\)](#), [4.2 \(Community connection\)](#), and [4.3 \(Partnerships and collaboration\)](#):

- Describe your activities engaging new users, new members for your decision-making body(ies), and developing leaders and organizers (2.1).
- Describe your activities creating or hosting spaces to encourage greater collaboration and engagement among your members (4.1).
- Describe how you engage with the contributing community that you serve and/or support (4.2).
- Describe your partnerships with other affiliates or with non-Wikimedia entities (4.3).

3. Please provide a link to reports that detail the activities that took place in the last year. This can include an annual report, Meta pages, and websites. (required)

If there are no links available, briefly describe the implemented activities and programs below or upload any files.

4. Are you interested in sharing what you achieved or learned this year with the wider community through different peer learning programs (e.g. Let's Connect program, Diff)? (optional)

Please insert a link to guides, training material, presentations, work processes, or any other material the team has created to document and transfer knowledge about your work that can be useful for others.

For affiliates, the following response to Question 5. also partially addresses **Affiliate Health Criteria** [4.1 \(Internal Engagement\)](#), [4.2 \(Community Connection\)](#), or [4.3 \(Partnerships & collaboration\)](#), where applicable.

5. Did you collect feedback from your community or target groups on how the activities implemented impacted them? If yes, please attach/provide information on the results (e.g. community surveys, stories, impact booklets/reports, interviews with partner institutions, etc). Did you collect other impact-specific data? (required)

See [examples of impact](#) that may apply in your context.

For affiliates, the following response to Question 6. also partially addresses **Affiliate Health Criterion** [2.2 \(Diversity balance\)](#).

6. During the fund period, did your efforts do any of the following? (required):

6.1 Bring in participants from the following groups:

- ☐ women
- ☐ people with disabilities
- ☐ neurodiverse people
- ☐ indigenous groups
- ☐ LGBTQ+ groups
- ☐ people from lower socioeconomic status
- ☐ young people
- ☐ speakers of minority languages
- ☐ underrepresented geographical regions (ESEAP, LATAM, SSA, MENA, SA)
- ☐ other
- ☐ none of the above

6.2 Develop content about the following underrepresented topics or groups of people:

- ☐ women
- ☐ people with disabilities
- ☐ neurodiverse people
- ☐ indigenous groups
- ☐ LGBTQ+ groups

- ☐ speakers of minority languages
- ☐ underrepresented geographical regions (ESEAP, LATAM, SSA, MENA, SA)
- ☐ other
- ☐ none of the above

6.3 Support the retention of:

- ☐ Editors
- ☐ Organizers
- ☐ Partnerships
- ☐ Wikimedians in Residence positions
- ☐ other
- ☐ none of the above

7. What, if any, effective tactics or approaches can you share that worked well when dealing with the programs under points 6.1-6.3 that you selected? (optional)

8. If you developed partnerships, which of the following factors most helped you to build partnerships? Please pick a MAXIMUM of the three most relevant factors. (optional)

- ☐ Permanent staff outreach
- ☐ Board members' outreach
- ☐ Staff hired through the fund
- ☐ Institutional support from the Wikimedia Foundation
- ☐ Volunteers from our communities
- ☐ Partners proactive interest
- ☐ Other

Part 2: Metrics

Note: The Wikimedia Foundation is developing an Event Registration tool with a connection to grant application IDs, as well as with a connection to the Events and Outreach Dashboard. This will allow grantees to see their impact more quickly and clearly, and reduce workload on self-reporting on editors and editing data during events. We encourage you to use the Events Registration tool in your future grants. Until this connection is live, we will continue to ask for you to report on the outreach metrics below.

For multi-year grants: Please report the metrics for the year you are reporting, not the cumulative results. If relevant, in space provided in comments and analysis you can comment how these results

compare to previous years or any metrics you might have changed or adjusted based on your learning and previous results.

9. Wikimedia Metrics: Participants, editors, organizers.

Metrics name	Target	Result	Tools used or comments
9.1. Number of all participants: <i>Existing and new participants involved in activities funded by the grant. It can include people that participate in events, training, campaigns, etc. It includes people that edit as well as those that participate in other ways.</i>			
9.2. Number of all editors: <i>Existing and new editors involved in activities funded by the grant</i>			
9.3. Number of new editors: <i>Newly registered editors brought in by activities funded by the grant</i>			
9.4. Number of retained editors: <i>Editors that continued to edit at least a month after the activities</i>			
9.5. Number of all organizers: <i>Wikimedia organizers involved in activities</i>			
9.6. Number of new organizers: <i>New Wikimedia organizers brought in by activities funded by the grant</i>			

10. Wikimedia Metrics: Contributions to Wikimedia Projects

Wikimedia project	Target		Result	
	Pages created	Pages improved	Pages created	Pages improved
Wikipedia				

Wikimedia project	Target		Result	
	Pages created	Pages improved	Pages created	Pages improved
Wikimedia Commons				
Wikidata				
Wiktionary				
Wikisource				
Wikimedia Incubator				
Translatewiki				
MediaWiki				
Wikiquote				
Wikivoyage				
Wikibooks				
Wikiversity				
Wikinews				
Wikispecies				
Wikifunctions or Abstract Wikipedia				

11. Did you set other quantitative and qualitative targets for your project (other metrics)? (required) Yes/No

11.1. Other Metrics.

In your application, you outlined some other open metrics that you would like to measure. Please fill out the achieved results for each of the other metrics you defined.

Metrics	Name	Description	Target	Result	Comments	Tool used
Other Metrics 1						

Metrics	Name	Description	Target	Result	Comments	Tool used
Other Metrics 2						
Other Metrics 3						
Other Metrics 4						
Other Metrics 5						

Part 3: Skill development / Capacity building

For affiliates, use the following space (Question 12.) to address **Affiliate Health Criteria 2.2 (Diversity balance)** and **3.1 (Diverse, Skilled, and Accountable Leadership)**:

- Describe actions taken to prioritize gender balance in affiliate leadership, as well as any areas of diversity relevant to your affiliate's context (2.2).
- Describe the management, financial, or other leadership skills of your affiliate leaders. If you have a succession plan, please include it here (3.1).
- Describe any training or skill development (as outlined in the question above) (3.1).
- Incorporate into the annual report a disclosure of conflict of interests (if any) from the leadership (3.1).

12. Reflecting on your programmatic (external) and organizational (internal) work, did your grant support you to undergo any skill development that made a difference to your success? (required)

If yes, what skill was developed, and how did it lead to success? (e.g. received coaching on public speaking, attended training on nonviolent communication, hosted professional development conversations on leadership, learned and used a new tool for project management, etc.)? Can you share any materials?

13. What is one capacity/skill area that you would like to focus on for the next year? And how do you plan to achieve this capacity? (required)

For affiliates, also use this section (Question 14) to fulfill the Affiliate Health Criteria requirements.

- Describe and link to any public-facing documentation for affiliate governance, including affiliate leadership and membership with a breakdown of the demographics; how elections are conducted; how conflicts of interest are declared; and how decisions are made and communicated (2.2, 2.3, 3.1).
- Describe and link to any public-facing documentation for activities incorporating, promoting awareness about, or enforcing the Universal Code of Conduct in your affiliate's activities (3.3).

- Describe and link to any public-facing documentation for internal membership engagement, such as notes from your regular meetings and how you communicate to or involve your membership (4.1).

14. If you have additional information or reflections that don't fit into the above sections, please write them here. Use the space below to upload any additional documents that would be useful to understand your report.

Please note: Use Other public document or Other confidential document labels.

Part 4: Financial reporting

For affiliates, also use this section (Part 4: Financial reporting) to address [Affiliate Health Criterion 3.2 \(Financial & Legal Compliance\)](#).

15. Please state the total amount spent from this fund in your local currency. (required)

For multi-year grants: Please report on the spending for the current year you are reporting, not the cumulative spending.

16. Please provide an overview of the amount spent from this fund in the following budget categories in your local currency. (required)

For multi-year funding, please provide the breakdown for the year you are reporting.

16.1. Total spent - Staff and contractor costs (Personnel costs). (required)

16.2. Total spent - Operational costs. (required)

16.3. Total spent - Programmatic costs. (required)

17. Did you have any other revenue sources (e.g. other funding, membership contributions, donations)? (required) Yes/No

If yes,

17.1. Provide the total amount received from other revenue sources in your local currency. (required)

17.2. Provide the total amount spent from other revenue sources in your local currency. (required)

	Planned / received budget for this category	Spending
Staff and contractor (Personnel) costs		

	Planned / received budget for this category	Spending
Operational costs		
Programmatic costs		
Total from Wikimedia Foundation Funding		
Other revenue		

18. Provide a financial report document which will provide the details of funds received and spent in the currency of your fund. (required)

Your financial report will be shared publicly. We recommend you use the [template](#) provided or the format you used to present your initial budget. (required)

- **18.1. Upload the financial report**

Upload the financial report in the upload field below. Note: Please add Financial report as the file label. (help video)

- **18.1. Provide the link to the financial report**

If you use Google Sheets, please remember to provide the link and share public access, so that anyone with the link can view the document.

18.2. If you have not already done so in your financial spending report, provide information on changes in the budget in relation to your original proposal. (optional)

For multi-year funding: please report on any changes during the year you are reporting, not changes in previous years.

As required in the fund agreement, please report any deviations from your fund proposal here. Note that, among other things, any changes must be consistent with our Wikimedia Foundation mission, must be for charitable purposes as defined in the grant agreement, and must otherwise comply with the grant agreement.

19. Do you have any unspent funds from this funding?

For multi-year grants: please report on any underspend during the year you are reporting, not changes in previous years.

☐ **No**

☐ **Yes**

If yes:

19.1. Please list the amount of unspent funds in your local currency. (required)

19.2. Explain why you did not use the amount. (required)

19.3. What are you planning to do with the underspent funds? Please see the instructions for returning unspent funds. Select one.

- ☐ A. Propose to use the underspent funds within this Fund period with PO approval
- ☐ B. Propose to use them to partially or fully fund a new/future grant request with PO approval
- ☐ C. I am planning to send them back to the WMF
- ☐ D. I have already sent them back to the WMF

If you responded A or B:

19.4. Please provide details of hope to spend these funds.

If you responded C:

Please see the [instructions](#) for returning unspent funds.

If you responded D:

19.5. Please upload a copy of your transfer receipt. If a receipt is not available, please provide the following information below, so that we may trace your wire.

1. date sent
2. amount and currency sent
3. your grant name:

20. Final confirmations (required)

20.1. Are you in compliance with the terms outlined in the fund agreement? (required)

- ☐ Yes
- ☐ No

20.2. Are you in compliance with all applicable laws and regulations as outlined in the grant agreement? (required)

You must be in compliance with relevant tax laws and regulations restricting the use of the Funds as outlined in the grant agreement. In summary, this is to confirm that the funds were used in alignment with the Wikimedia Foundation mission and for charitable/nonprofit/educational purposes.

- ☐ Yes
- ☐ No

20.3. Are you in compliance with provisions of the [United State Internal Revenue Code \("Code"\)](#)? (required)

In summary, this is to confirm that the funds were used in alignment with the Wikimedia Foundation mission and for charitable, nonprofit, educational purposes.

☐ Yes

☐ No

Thank you for taking the time to share all your learning and reflections. We look forward to our conversation so that we can learn more from you and share with other communities in the Wikimedia movement.