
Membership Development

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Executive Summary

Following comparative review of other chapters, an online consultation and a members' survey, it is recommended that Wikimedia UK pursue a regional approach to recruitment, and support this through an enhanced package of benefits for members and opportunities for members to develop their role within the organization.

The Board of Trustees is asked to approve the strategy as described, and request a fully costed work plan for the next board meeting, having indicated preference for how this could be funded through a budget line, or project grants to support work in specific regions.

Other Organisations

A quick look at what four other key Wikimedia Chapters are doing with membership.

Wikimedia Deutschland

Their 2011 Annual report states WMDE has 928 active members and 345 sustaining members, who have voting rights to elect their board. Their dues are €12 - 24 for individuals or €100 for organizations.

Membership work of note:

- Has two types of membership – ‘active’ and ‘sustaining’
- Members receive the quarterly WMDE newspaper ‘Wikimedium’
- Volunteer meetups take place in roughly 50 cities across Germany, Austria and Switzerland
- They are focusing on doubling their volunteer capacity this year

Wikimedia Sverige

Has around 230 members, who have voting rights to elect their board. Their dues are 100 kroner per annum (equivalent to £9.50) for individuals and 1000 kroner for organisations.

Membership work of note:

- An intermediary role known as ‘local agent’ (Lokala ombud) exists whose express purpose is to coordinate interaction of members and project users through local initiatives – these are volunteer roles.
- There is a page on the SV wiki that invites suggestions for how to increase member participation in the association
- They manage a ‘community portal’ on wiki to facilitate communication between board and membership and encourage programme suggestions (Not dissimilar to our Watercooler, but with a more specific remit)

Wikimedia France

Has around 350 members, four of which are organisations. Membership fees are €24 or €12 for concessions. Members sit on that Chapter’s Grant Committee alongside board members.

Membership work of note:

- They have ‘Honorary Members’ who can be awarded lifetime membership and voting rights without the requirement to pay dues
- Members can initiate decisions to be submitted to a vote of the Board
- Members can be empowered to run working groups, which can be designated to oversee tasks (much like Conference committee) or consider issues around a certain issue or them (such as a proposed Technical Committee).

Wikimedia Foundation

Does not have a membership system – this was determined in 2006. Proposals prior to that focused on a higher membership fee for non-editors (\$60) and a significantly lower fee for contributing and active editors (\$6).

Currently eligibility to vote in elections for the Foundation’s board of Trustees is determined solely by active editor status (300+ edits and a user profile older than one year)

Membership consultation on Wikimedia UK

On 11th October a page was created on the UK Wiki inviting interested parties to comment on a strategy for membership. This was posted to the UK list and reminders sent at roughly weekly intervals to try and encourage wide participation, as well as direct emails being sent to one former membership secretary. Despite this, only one individual chose to comment directly, which is unfortunate and underlines the need to actively pursue other mechanisms for receiving feedback.

The consultation broke responses down into three key areas; recruitment, communications and benefits.

Given the low level of response it would be inappropriate to give this undue weight, but the participation did highlight some key areas to consider:

- Caution should be exercised in seeking to recruit a wide but inactive membership base, as this may present a drain on resources. Higher numbers will require close work to ensure that members are appropriately engaged and empowered.
- Clearer demarcation of member, editor and volunteer roles will help elevate and boost the each. While many wear all three hats, many more do not and we must be careful to speak to each audience individually, and plan paths to encourage people to take on another role.
- The best approach in terms of recruitment is probably enabling more person-to-person recruitment. This could be supported by staff and through the provision of merchandise to aid recruitment.
- Membership strategy should be as closely in accordance with the principles underlying the Volunteer Policy as possible. In practice this could mean members' lead recruitment and activities, and are supported in doing so by staff. However, this may present problems in terms of a consistent approach, so this will need to be monitored.

In order to supplement this, Wikimedia-uk lists discussions to January 2010 where the subject indicated a discussion thread about membership were reviewed, which highlighted the following:

- January 2012 – It was identified that the delineation of roles in respect of managing membership was unclear, and that this was unsatisfactory.
 - This is still complicated, with Richard performing the duties of the company secretary in terms of membership records, Katherine now responsible for membership communications and development, and Mike Peel holding the title of Board Secretary.

- May 2011 – It was identified that the status of under 18s being allowed to be members or requiring a parental signature was unclear
 - It should be noted that this is still not clear on the UK Wiki sign up page, although it is on the PDF form.
- April 2011 – The question of diversity in the membership base was raised in response to discussions about diversity in the board. Gender diversity in both was noted as poor, and discussions highlighted that there was no ‘signposting’ of how to get more actively involved (rather than just attend a meetup) or empowering young members to feel confident to take on responsibility.
- February 2010 – Cutting the membership from a two tier fee (£6 and £12) was extensively discussed.
 - It was noted the primary purpose of a fee was not to generate revenue, but as a token of commitment; there were conversant concerns about the message sent by having a lower fee. It was observed that the existing fee level or a lowered version might not present a barrier or incentive to joining.
 - It was noted that if the primary purpose of the membership base was maximum inclusivity, and therefore representation of the UK Wikimedia community, a lower rate was probably better.
 - Concerns about having a broad based, but inactive membership were expressed.

Member survey

A survey was emailed to all members with a personalized link on Tuesday 30th October. There were 54 respondents of a potential 249 recipients.

Some concerns were expressed about the nature of some of the questions for equal opportunities monitoring given that the survey was not anonymous – a deliberate choice to prevent non members completing the survey. These were addressed in full on-wiki and individual responses were deleted as a matter of course when the cohort data was collected after the survey was closed. The aggregate survey results have been uploaded to the UK wiki.

Headline results

Question	Wikimedia UK	UK Population
How do you identify your gender?	Male – 89% Female – 11%	Male – 49% Female – 51%
How do you identify your sexual orientation?	Straight – 84% Gay – 6% Bisexual – 6%	Straight – 94% Gay – 1.1% Bisexual – 0.4%
Age categories (Top three largest groups)	60 – 69 – 26% 30 – 39 – 20% 50 – 59 – 15% 21-29 – 15%	60 – 69 – 11% 30 – 39 – 13% 50 – 59 – 12% 21-29 – 14%
Education level	B.A. – 27% M.A. – 31% Phd – 14%	In 2010, 31% of the UK population had an NQF level 4 or above (B.A. or higher)
Annual income	Less than £24,000 – 43.9%	Less than £24,000 – 66%
Households	<ul style="list-style-type: none"> 58% of respondents either married, or in a relationship and cohabiting 17% have children, all above 5 years old. 	

It could be said from the survey that a typical Wikimedia UK member is most likely to be male, older, highly educated, possibly have a higher than average disposable income and a family life. This is information worth knowing – it should help us plan our member services better, both to meet the needs of this core group, and look at reaching out to less well represented groups such as younger people and women.

The results provide insights in the following key areas:

Benefits

Over a third of members didn't know if there was a volunteer meet up near them, and a further 28% didn't have a meet up near by – of these over half would like to help set one up. Over a third have never attended a meet-up – and the reasons given most were lack of time or a lack of interest. Two thirds would attend events held specifically for members in their region.

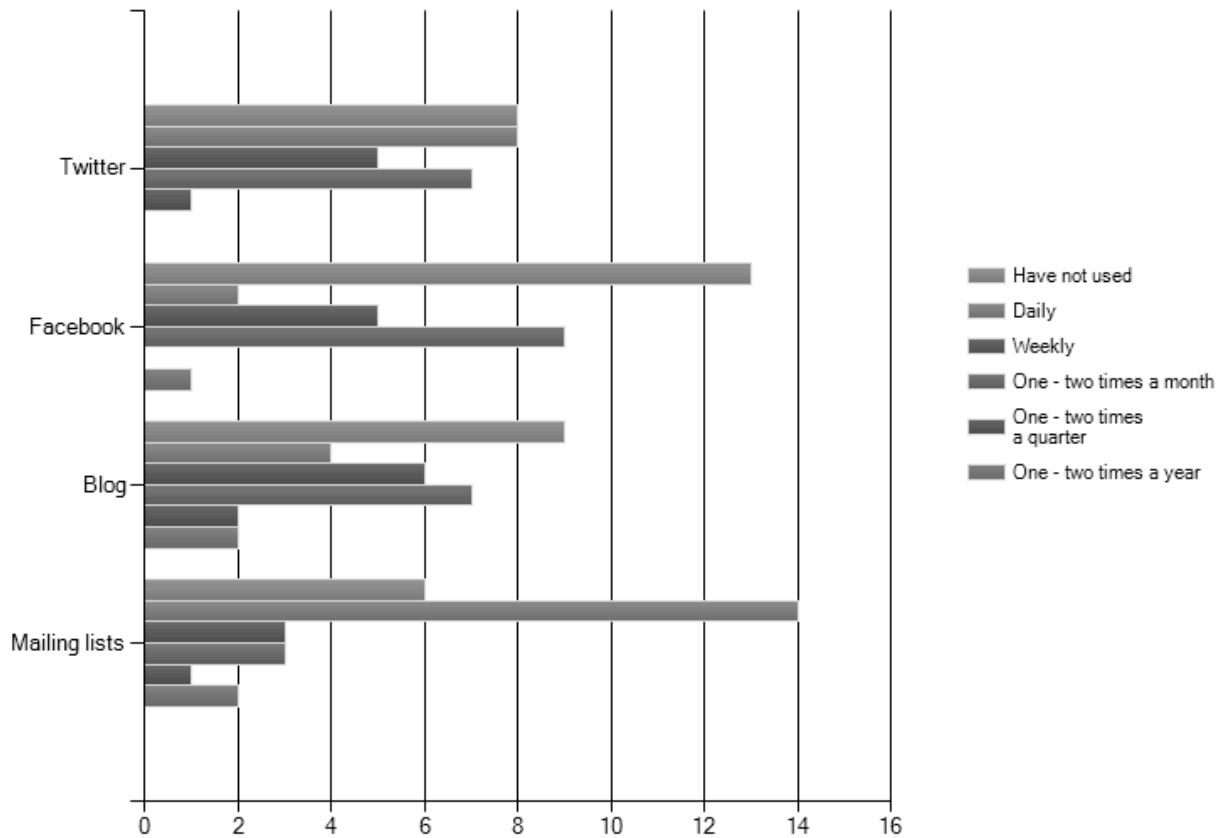
A majority of members felt the criteria for membership should not be linked to editing experience (as is the case for voting rights for the WMF board). They were also in the majority not in favour of granting discounted or free membership to editors from under-represented groups – although the split on this question could imply they are in favour of targeted outreach, but don't feel this is the most effective mechanism for doing that

Individual responses showed a wide perception that membership fees were already low, and therefore did not present a barrier to participation. Where there was support for preferential rates for discounted or free membership, older people and under-18s were mentioned as possible choices.

Communications

Two thirds of members were aware of the variety of channels that allow them to remain updated about the Chapter, and showed a range of engagement – the mailing list is a key regular source of information, followed by Twitter. This group does not use the Facebook page and blog as regularly, if at all.

How regularly would you read news about Wikimedia UK from any of these sources?

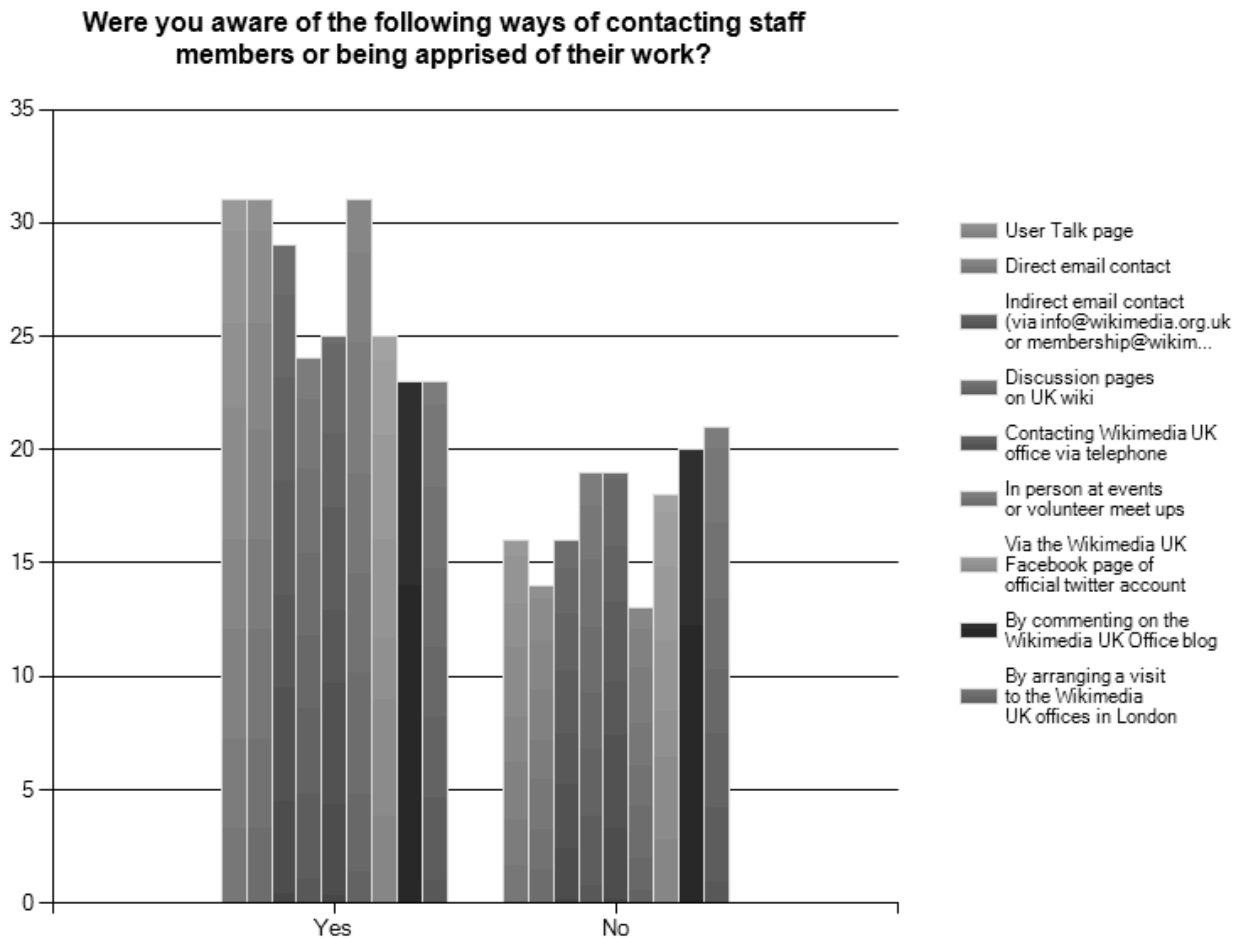


Members overwhelmingly want regular mailing in e-newsletter format – with 45% wanting a monthly mailing, and 30% a quarterly mailing. Members were keen to see a range of content, but were very keen to see events and volunteer meet-ups covered, as well as updates from staff and opinion pieces written by members. Individual suggestions included a section dedicated to ‘free sharing of information’ issues and related organisations’ work in this area, and advertising opportunities for paid employment in WMUK or Wiki-projects

Respondents were mostly happy with the current membership pages on the UK Wiki about the sign up and responsibilities process. Feedback from those who wanted to see this develop want a re-designed sign-up page clarifying the process and options for new and renewing members, and an organizational structure page. Individual responses also suggested membership case studies, or signposting links to organisations with similar aims.

28% of respondents had contacted a staff member or Trustee on wiki, and pleasingly, 100% of these people felt they had received a satisfactory response within a reasonable timescale.

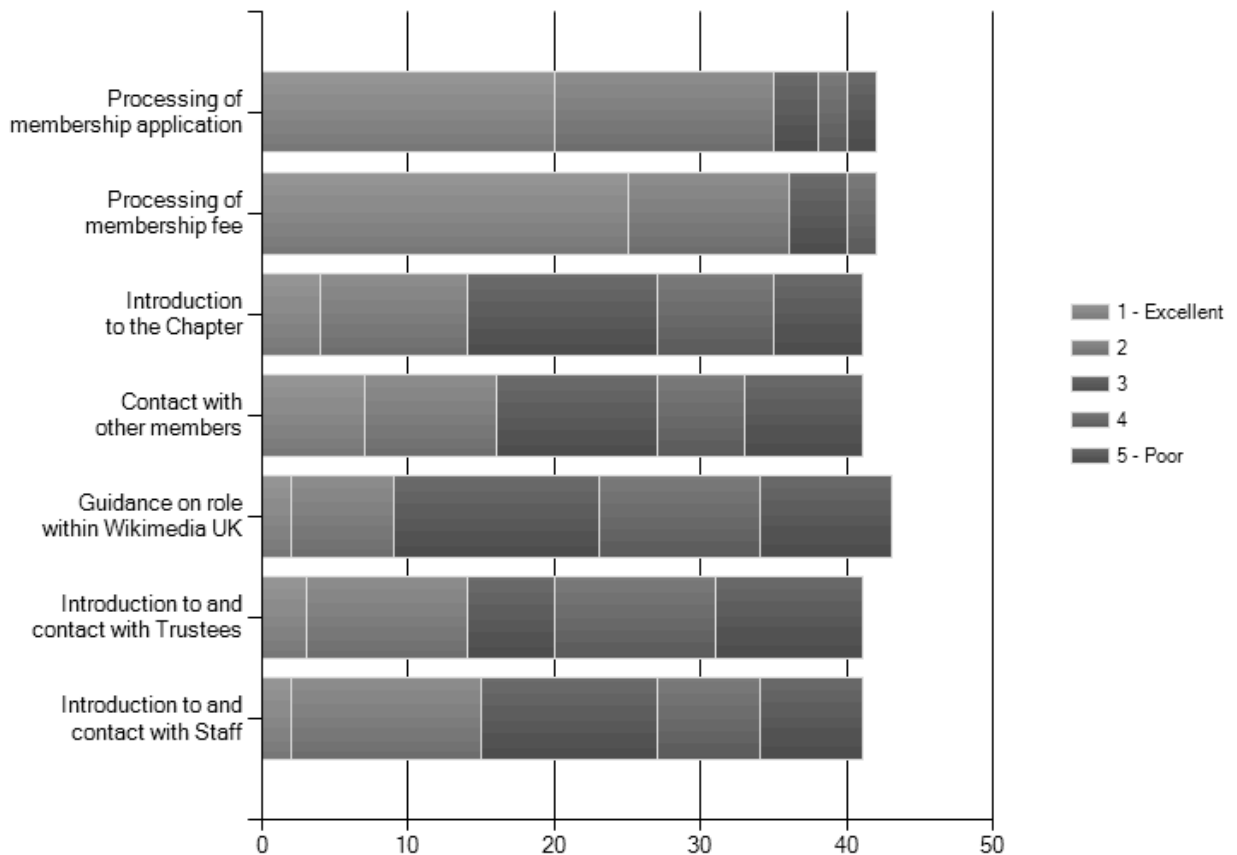
Only 10% of respondents answered that Staff and Trustees were unresponsive to them, but a majority did say they ‘didn’t know’ if Staff or Trustees were responsive – implying there is work to do here. Answers to questions around how to contact people provide some insight, suggesting we need to clarify how Trustees or staff can be contacted (and, ideally, for what purposes)



Chapter and Community

Responses to the question ‘How would you rate your experience as a new member?’ were revealing, suggesting areas we might have thought weren’t good enough (processing applications) are not as much of an issue as communicating with members and helping them feel like they can contact each other, the Trustees, and the office.

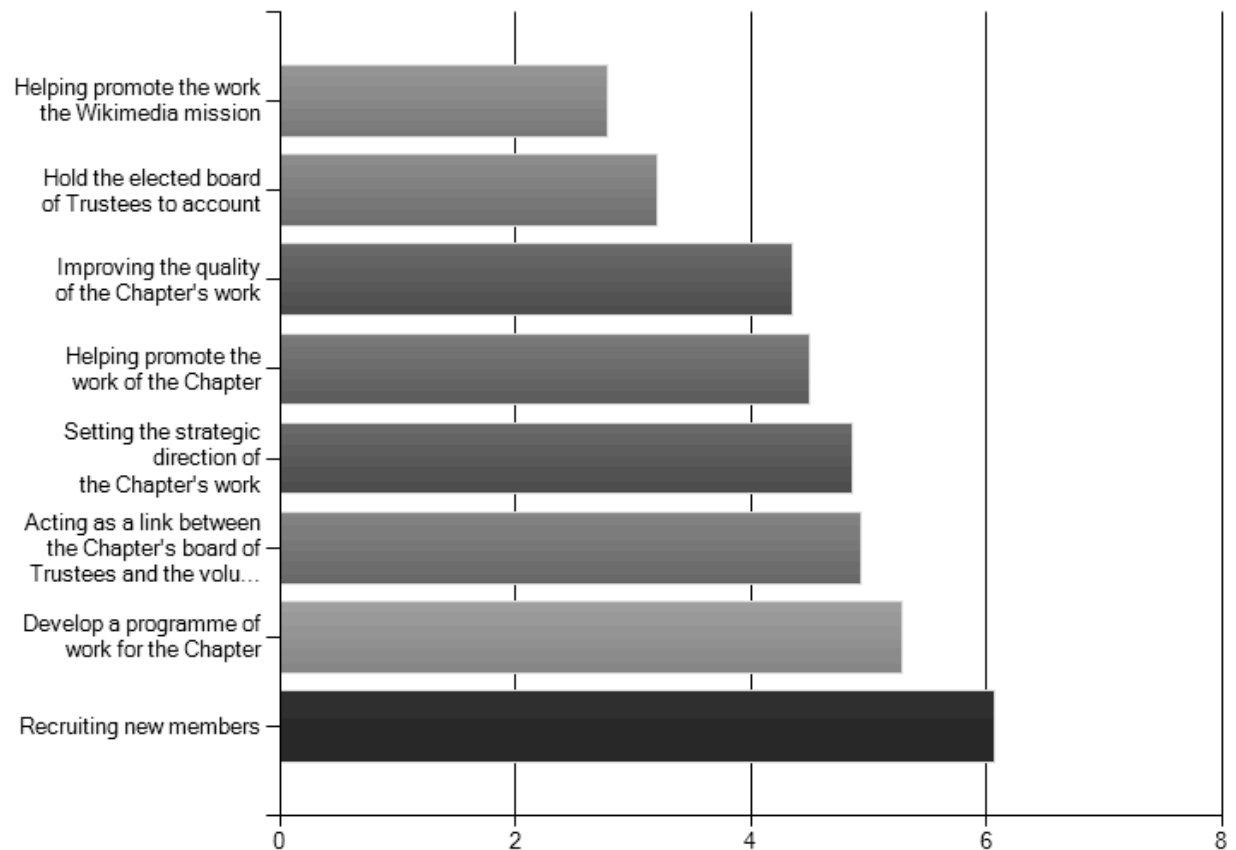
How would you rate your experience as a new member? Please rate against the following areas with 1 being 'This was excellent' and 5 being 'This was poor'



Again, pleasingly, the majority of respondents fed-back that they had not felt excluded on the grounds of a protected characteristic as defined by the Equality Act 2010. Where people did feel this, individual responses mentioned disability (without specifying particular needs) and suggestions for improving this focused on more tact and sensitivity in our person to person communications, and making an effort to help people feel included and empowered.

A majority of respondents felt they did not 'have a clear understanding of the role members play in the organization of Wikimedia UK'. This was substantiated by responses to the follow-up question – which showed a positive understanding of the roles members can play, but also confusion.

Please rank in order of most relevant the following statements about the role members play in the organisation of Wikimedia UK, with most relevant ranked '1'.



For example:

- 'The membership sets the strategic direction of the Chapter' is not the case – it elects Trustees to do this.
- 'Developing a programme of work for the Chapter' is also strictly speaking not the particular preserve of members, but comes from the community, supported by staff – although members are encouraged to participate in the drafting of the annual plan as much as any other community member.
- 'Holding the elected board of trustees to account' this is a key responsibility, as only members have the voting rights to do this, but came relatively low (although possibly respondents felt this was achieved through on wiki discussions, and therefore was a wider responsibility)

Work therefore needs to be done to elicit the particular and special role of members in relation to other groups in our organization.

7% of our respondents have stood as Trustee candidates in the past. Of the remaining 93% a variety of reasons were given for not standing, particularly lack of time and inexperience in the Wikimedia movement. Individual responses included from concern about the level of negative attention Trustees have to contend with.

The final questions raised some interesting general points. Three quarters of respondents felt a change to the system for electing trustees would make no difference to their likelihood to vote – 22% felt it would make them more likely to vote. Clearly while a change to the system would not be negatively received, we need to find other methods to improve voting turnout.

In addition, a majority of respondents responded that they would be interested in participating in member workshops themed around policy and governance. There may therefore be a role for these in addressing some of the issues suggested by the results.

Summary

The results of this survey are indicative rather than statistically significant – we would have required a sample size of over 150 responses to be able to draw these conclusions, whereas there were only 54 respondents.

Future surveys will be developed to

- Refine questions about demographic data – re-aligning the questions to match those asked by the Office of National Statistics so data is more easily comparable to national average.
- Linked more explicitly to a page on the UK Wiki explaining the intent of the survey and data processing arrangements
- Seek to start earlier, remind during, and possibly incentivize with a small appropriate prize to increase the response sample size and achieve statistically significant results.

Overall this first survey has highlighted some useful areas. I'm going to propose a follow up survey be administered in August next year, to measure any change in perceptions, and then annually henceforth.

Proposed strategy

To develop a strategy over the four key areas of member recruitment, communications, benefits and development, I have worked on the following assumptions:

- It's helpful to talk about members as having a particular role and then relate that to other roles, such as editor or volunteer.
- Members' basic role is to elect trustees, approve our annual accounts, approve our audit and banking arrangements, define board and membership terms etc. They are therefore inimical to our governance arrangements.
- However, membership can be more broadly defined as 'supporter', as some editors and volunteers feel they are sufficiently involved in the life of the Chapter without becoming members. We can infer that those that are members are particularly prepared to show their support and have a stake in the Chapters' wellbeing and direction.
- Members should be rewarded for their additional stake in the Chapter. This should be through a combination of member benefits – as currently they receive nothing specifically for members beyond voting privileges – and possibly more explicit opportunities to influence policy and governance beyond voting rights.
- This will mean offering some benefits to members that are not necessarily available to volunteers or editors.
- Ultimately however we should seek to nurture our membership as potential editors and volunteers. We should regard our membership as a 'seed-bed' for such activity, both to benefit our work and hopefully members themselves.

Recruitment

The board meeting in September records the board as wishing to get 'as many members as we can, even if they are not as active' and links this to a joining pack which can signpost members to more active involvement, particularly in editing.

However, if membership responsibilities primarily relate to governance, and strategically we want to foster new editors and volunteers from membership, then established editors are not the pool of people we want to target for recruitment. We want to recruit new editors and sympathetic/interested individuals who we can draw into becoming more engaged editors and volunteers.

The result of the membership survey and consultation suggest a regional approach would be welcome. By splitting the UK up into regions and identifying existing members in those regions we can invite people to volunteer as 'local agents' for their region, following the WMSV model. Local agents could be invited to come to the WMUK offices (or indeed staff

could travel to meet them) to discuss opportunities in their region, set up meet-ups, and apply for micro-grants to support these where appropriate. There could be more than one local agent for a large region – London would be one area where this could be appropriate.

There would be no requirement to elect them – they would be volunteers with a specific remit. Their primary goal would be to make sure membership sign up was advertised at events and meet-ups, and to liaise with the office to organize members' events and opportunities. Ideally these would be some of our current members who have an interest in meeting people and good people skills, relevant experience (from being, say, a cub scout master, to a membership secretary) and no other formal role in the organization to compete with their time.

Ultimately I would like to see these roles working to ensure members in their region had an event or two a year to attend, are well represented at AGMs and Wiki Conferences, and are working with local volunteers and the editing community to develop partnerships with local cultural and educational institutions. I would like to see the same number of members as currently located in London (around 50) in the other regions – this alone would take our numbers to over 1000 if all Welsh and Scottish regions are taken separately.

To begin with I would envision piloting this approach in a couple of our larger regional bases, especially in the area where it is determined Wiki Conference 2012 is held, and then rolling this out further based on lessons learned. A key task to support this work will be the development of a new members and renewing members joining pack, which can be offered in an electronic format to reduce costs, and therefore include a range of resources, from an introduction, how to edit documentation, guide to getting the most out of the UK Wiki and so on.

Communications

Clearly a membership e-newsletter is long overdue, and this is now a top priority to fix. A part of this content will be to re-iterate other sources of information already available – re-drawing attention to the blog and other rich sources of information. Over time it should also seek to address some of the issues highlighted by the survey – a lack of clear understanding about the role and responsibility of a member, clarity about Trustee and Staff business, and the success stories from within our membership.

The survey suggested most members would like to see a monthly e-newsletter, with a close second being a quarterly option. There is some concern about how much staff time this could take to be done well. Therefore I suggest a piloting approach, with two monthly e-newsletters in December and January, with a report-back on key metrics (time taken, responses, click-throughs) to determine if we follow a monthly newsletter, or a more in-depth quarterly version as is the case for WMDE.

A further piece of work will be expanding and re-organising the joining section of the UK Wiki. While this is fit-for-purpose, most members fed-back that a differentiated sign up process would be appreciated, and it feels like this may be a good area to evince roles of members, Trustees and Staff, through a structure diagram that more clearly lays out current roles (the existing one on the staff page is too simplified in this regard).

Benefits

Members have clearly indicated their preferences in terms of benefits. To clarify these, I'd like to work towards being able to offer the following

- A regular newsletter (monthly or quarterly)
- Regionally based meet-ups for members and volunteers
- Access to facilities at Development House
- Free account access to JSTOR or a similar online journals subscription service
- A regionally based event for members – whether supportive of project work or more social – at least annually (preferably more frequently)
- A members' only merchandise store

I think all but the last two are deliverable without huge cost commitments. In terms of the members' merchandise store – while some of the items are already in the office, there will be a longer term need to order more items. Events for members will cost money to support in terms of room hire or other associated costs (where we cannot get such things as gifts in kind from sympathetic organizations).

We will have to decide how to fund this, as there is currently no budget line for this activity in the 2013 Activity plan.

Development

There are some clear outcomes from the membership survey about how members would like to see themselves developing within their roles. Part of this is providing them with the right information in an accessible format so they know what they are in a position to gain from membership, and how to go about getting it.

However, there are further options with respect to enhancing the role members' play within our organization. Some members already feed into processes of developing our annual plan or discussing and influencing policy on-wiki. The most committed and informed members generally only engage this in, and as such we risk excluding the silent majority of our membership if we don't open this up.

I see three key areas where we should aim to offer members the chance for development on an individual basis, and as part of our organization:

Editor training

If we offer this to members we are meeting our strategic aims AND offering them an opportunity to engage more closely in the mechanisms of feeding back and engaging in how we do business. Not only will this hopefully encourage them to become editors of encyclopedic content, but it will give them confidence to participate in on wiki discussions, contact Trustee and staff members and contribute to chapter business.

Governance workshops

These could be rolled into regional events or Wiki conference, and should seek to re-cap the basics of charitable status, our articles of association and the rights and responsibilities of members, trustees, staff and the wider community and movement. These can be a powerful tool for engaging a wider base of our membership in our decision making and developing a strategy for the chapter. It will hopefully also provide a larger pool of members prepared to be volunteers, take on programme and organizing roles, thereby freeing up Trustees to focus on their already considerable primary responsibilities in respect of governance and oversight.

Policy development

While members shouldn't determine policies in the stead of elected trustees, or determine operational matters in the place of contracted staff, we have a pool of talent and experience that is not accessed enough. I would like to see us developing a formal mechanism for inviting members to help create and discuss policies that affect the chapter. This would be much in the same way as is currently the case with on wiki consultations, but perhaps given extra weight by being flagged up in member newsletters, and supported by in-person plenary sessions at Wiki Conference or local events. Themes for policy development could remain a focus for a given period of time – resulting in policy changes which could be brought to the board for approval.

Recommendations for approval

- That the Board of Trustees indicate their broad agreement with the approach described, specifying any areas of concern to be addressed.
- That the Board of Trustees indicate how they would like to fund activities to support membership recruitment and benefits.
 - A small budget line in this financial year would allow for the purchase of additional materials to support membership recruitment (badges and updated sign up forms that are easy to share at events).

- Alternatively, if appropriate, the intention of targeting three key regions as a pilot could mean funding could be sought through a project grant.
- That the Board of Trustees request an update report to be presented to the board meeting in January 2013, providing feedback on the success of membership newsletters and regional outreach work, and proposing a fully costed membership programme for approval and inclusion in the 2013 Activity Plan.