The Wikirate Project

▶Specification of Quarterly Priorities

Achieving project objectives adaptively via themed "huddles"

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Abtract
Quarterly priorities for the Wikirate Project are specified via "huddles", which alternate between in-person and online. This report outlines a schedule of huddles, explains the rationale for their themes, and connects those themes to project objectives.

History

Version	Date	Reason	Revised by
0.1	2013-12-18	First draft	Ethan McCutchen
0.2	2014-02-28	Integration of Project Objectives	Ethan McCutchen
1.0	2014-03-17	Addition of Abstract and Summary	Ethan McCutchen

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Executive Summary

Every quarter, the Wikirate Project will convene what we call a "huddle," a retreat where we assemble (alternately on- and off-line) to discuss the high level functional requirements for the next quarter.

At each huddle, we will specify the priorities for the quarter ahead, insuring that each consortium partner is clear on their responsibilities to the project, their deliverables due, the collaborators they will be working with, and the process by which the ends will be achieved.

Each huddle will have a *theme*, which is meant to be integrative, not constrictive; many topics outside of the theme will be discussed at each huddle. But there will be a major push to explore the theme deeply in the huddle, and the expectation is that there will be extensive research and development on the thematic material in the quarter that follows.

Note that this document does *not* seek to pre-determine the low-level development priorities for each quarter, and thus it does *not* map huddle themes to work package details, partners, stakeholders etc. That level of specification is to happen at the huddles themselves, and is to be documented in the "Post-Huddle Report" produced after each huddle.

Instead, this document seeks to insure that the huddles' thematic material is driven by and supportive of the high-level objectives of the project.

To achieve this end, the document first presents a *Schedule of Huddles* (Section 2). It then reviews the project's objectives, including a mapping of the huddles in which those objectives will receive heaviest focus (Section 3). We then explore more deeply the rationale for each huddle theme and convey in more detail how each theme will advance the project's core objectives (Section 4).

Table of Contents

1 Introduction

This document was prescribed in the Description of Work as follows:

D2.2.1) Specification of Quarterly Priorities: This deliverable provides an overview of the expected schedule of huddles and their main themes. It is to be updated as appropriate.

A huddle is a quarterly project retreats are designed to accomplish many objectives, including:

- Build consensus and excitement around team objectives
- Work intensively and interactively on key project challenges
- Deepen interpersonal connections and trust
- Make the work of each partner visible to all partners
- Identify and address issues related to communication and coordination

Huddles include representatives of all consortium partners as well as some invited community members. Together we create high level plans for key Wikirate.org challenges and determine key metrics for success in the quarter ahead. Wikirate e.V. spearheads organization of huddles, including approval of participants and logistical coordination.

Huddles will alternate between online and in-person events. Consortium partners will take turns hosting in-person huddles. Offline huddles will be coordinated by Wikirate e.V. and will include both synchronous and asynchronous interaction.

By design, the huddle schedule is a living document. It is highly probable that the themes envisaged at the start of the project for huddles in year three, for example will require reorganization based on the findings and progress of the first two years.

At each huddle, the consortium members will discuss the schedule to revise and clarify as needed. Before a huddle's close, precise dates will be set for the following huddle.

The authoritative copy of the huddle schedule will reside at docs.wikirate.eu/Huddle+Schedule. Wikirate e.V. is ultimately responsible for the maintenance of the document, but all edits will be emailed to all consortium members (**consortium@wikirate.org**) and any conflicts will be resolved by the Project Management Board (PMB).

Each huddle will have a *theme*. The theme will not strictly limit the conversations discussed at the huddle; each huddle will of necessity cover topics spanning the breadth of the project. However, the theme will provide a central emphasis for the huddle in an effort to bring the full team's attention to an issue of central importance to achieving the project's long-term objectives. Furthermore, it is expected that research and development in the quarter that follows will significantly advance the thematic issues discussed.

The present document presents the schedule of huddles, their themes, and their mapping to the project's objectives.

It does *not* map the themes to specific work packages and deliverables; that level of specification is to be determined quarterly at the huddles themselves and documented in the Post-Huddle reports.

2 Huddle Schedule

Num	Year	Month	Theme[1]	Location
I	2013	Nov 20-22	Kickoff	Cambridge, UK
II	2014	Mar 4-8	Community	*Online*
III		Jun 11-12	Games / Currency	Thessaloniki, Greece
IV		Jul-Sep[2]	Internationalization	*Online*
V		Oct-Dec	Ratings / Quantitative	Trento, Italy
VI	2015	Jan-Mar	Sensors	*Online*
VII		Apr-Jun	Data Visualization	Berlin, Germany
VIII		Jul-Sep	Data Quality	*Online*
IX		Oct-Dec	Community II	*In-Person[3]*
X	2016	Jan-Mar	Games / Currency II	*Online*
XI		Apr-Jun	Broader Impacts	*Online[4]*
XII		Jul-Sep	Future Directions	*In-Person*

Table 2.1 1 Huddle Date, Theme, and Location

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[1] The proposed themes are explained in more detail in section 4

[2] Exact dates for huddles are set one huddle in advance.

[3] The locations of the final two in-person huddles have not yet determined.

[4] A second consecutive online huddle is scheduled here so that the final huddle can be in person.

3 Objectives

The Huddle Schedule was designed in support the following project objectives and project tasks (taken from the Description of Work, section 1.1.2)

Objective 1: Improve Collective Awareness

1. **Create an open social networking system** to allow for cooperative creation and sharing of knowledge regarding a company's ethical practices. This requires a crowdsourcing platform with an excellent user experience, ubiquitous website availability including mobile integration, the support and integration of real-time gathering of information through sensors, a multi-lingual set-up, anti-trolling/anti-spam prevention devices etc.

   Huddles: II, IV, VI, VII, VII, IX

2. **Create and support an active community**. This requires a significant dissemination budget to attract new users and implement appropriate community features to retain users and encourage participation.

   Huddles: II, III, IV, VI, VII, IX, X

Objective 2: Enable stakeholders to act on their improved awareness

1. **Design and implement a crowdsourced comparative rating system** that allows users to personalize a company's rating according to their individual values and determine what companies are demonstrating better or worse practices compared to the industry average.

   Huddles: V, VIII

2. **Engage users around sustainability topics** with low barriers to contribute.

   Huddles: II, IX, VI

3. **Incentivize users to contribute quality content** through effective incentive and reputation systems including gamification, and by being part of the Wikirate community.

   Huddles: III, VI, VIII, X

4. **Visualize the data in appealing ways**, such as via timelines (e.g. history of company practices), maps (e.g. local impacts) etc.

   Huddles: V, VII

Objective 3: Incentivize companies to act responsibly

1. **Update companies on their Wikirate standing vs. their competitors**. Survey companies on Wikirate's impact on their practices.

   Huddles: VII, XI

4 Huddle Themes

This section provides a brief overview of the themes outlined in the Huddle Schedule (Section 2).

4.1 Kickoff

The theme of the first huddle was *kickoff*. The huddle's priority was on shared understanding of the project's vision, the role of all partners, current resources, project management tools, and initial priorities.

4.2 Community

The theme of both Huddle II and IX is *community*. These huddles will focus attention on understanding Wikirate users from the lens of community interactions with an eye to supporting the cultivation of a large, diverse, welcoming, active, supportive, productive community on Wikirate.org. The recurrence of this theme reflects its centrality for the Wikrate project. It was selected as the theme for the second huddle because of the urgency of building early community to create content, establish healthy dynamics, and focus development upon real user needs. We reprise this them in Huddle IX in advance of the Wikirate.org Full Launch (Milestone 4 in the Description of Work) in order to refocus energy on community at a time when outreach to a wider audience will have significant community impacts.

Key objectives: 1.1,1.2, 2.2

4.3 Games / Currency

Huddles III and X will focus on *games* and *currency*. "Games" here refers to using gaming patterns on wikirate.org to make the site fun and engaging. "Currency" here refers *not* to monetary currency but to any quantized indicator of flow on wikirate.org, such as reputation

systems, edit counts, and indicators of the trustworthiness of a data source or the number of views of a given claim. In short, this huddle will look at how site metadata can be used to measure and incentivize richer community interactions and ultimately more robust data about the companies and topics researched on wikirate.org. This is the only theme other than "Community" visited twice, and in each case it follows a Huddle with a Community theme. This emphasis and timing reflects the position that gaming and currency will have dramatic impacts on community dynamics, and they must be extremely well designed in order for those impacts to be positive.

Key objectives: 1.2, 2.3

4.4 Internationalization

Our fourth huddle will center on internationalization. Unlike Wikipedia, Wikirate does not expect to have completely separate websites for different languages but instead expects to integrate data from multiple languages in a single site. This huddle will dive into all aspects of this challenge. Note that multi-lingual support is included in the Beta 2 milestone approximately six months after Huddle IV. The decision to focus an early huddle on internationalization reflects the desire to make Wikirate multilingual as soon as possible in order (a) to insure the site doesn't become overly English-centric, and (b) to tackle the significant community challenges involved while that community is still comprised of early adopters.

Key objectives: 1.1, 1.2

4.5 Ratings / Quantitative

The latter half of the name "Wikirate" conveys the original intent to include quantitative ratings of corporate behavior on wikirate.org. The fifth huddle will focus the consortium's attention on this goal ahead of the Beta 2 milestone, which includes the introduction of ratings. While there is much design to be done in this arena, we expect that there will be a stronger element of automation in the integration of quantitative data, and that postponing this integration until after we had created a strong base of contributors would serve the purpose of establishing a

dynamic on Wikirate.org where automation serves the community, rather than that the community cleans up after automation.

Key objectives: 2.1, 2.4

4.6 Sensors

Wkirate.org will provide simple mechanisms for users to contribute multimedia to support claims. The sixth huddle will center on the necessary technologies (a) to make these contributions as simple and enjoyable as possible (including the possibility of mobile data uploads), and (b) to ensure the community is well equipped and incentivized to sort through this incoming data and insure the most valuable contributions are also the most visible. Our expectation is not that this huddle will mark the beginning of work on sensors, but that Huddle VI will focus team attention on this very attractive aspect of Wikirate.org at the time of the Beta 2 Milestone, when we hope to see substantial increases in community activity. [5]

Key objectives: 1.1, 1.2, 2.2, 2.3

4.7 Data Visualization

By Huddle VII, we expect to have accumulated enough claims and quantitative ratings that the Wikirate community will increasingly need new ways to process and visualize all that data. This huddle will focus not only on designing and implementing new visualizations but also considering the impacts on user experience, community dynamics, and broader perception of wikirate data. Our expectation is that these visualizations will not merely be an "output" of wikirate, but will be central to the experience of navigating Wikirate.org's data.

Key objectives: 1.1, 2.4, 3.1

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[5] It should be noted that in no case will we postpone work on a given thematic area until a huddle with that them has been held. Considerable work on sensors, for example, will be accomplished before the sensor-themed huddle (#6). However, this huddle will be the first time the consortium has worked together collectively with such strong focus on this theme.

4.8 Data Quality

Data quality will undoubtedly appear as a discussion topic in all huddles, but our eighth huddle will bring this theme to the forefront. By this time we expect both the quantity of data and the tools for visualizing it to have reached a point where we can make well-informed judgments about patterns in the quality of the data on wikirate.org and take steps together to improve it wherever possible. The timing of Huddle VIII also insures that we will have enough time for course corrections as needed in order to approve data quality.

Key objectives: 1.1, 2.1, 2.3

4.9 Broader Impacts

The overall expected impact of Wikirate is the emergence and take-up of new sustainable organizational and behavioural models at individual and community levels, resulting in sustainable social and economic innovation. Our penultimate huddle will examine what effects the site is actually having and investigate opportunities to amplify its positive impact on corporate behavior. By Huddle XI we hope to see strong indicators of positive impact, and broadening our gaze in this Huddle will still give time to adapt the site based on what is learned.

Key objectives: 3.1

4.10 Future Directions

In the final quarter of the three-year CAPS grant, the consortium members will take stock of the project and ask what comes next.

4 Conclusion

The Schedule of Huddle (section 2) insures that the consortium partners of the Wikirate Project will gather regularly to re-establish connection to the project's long-term objectives as conveyed in the Description of Work. Each objective will receive special focus in multiple huddles, and will then be translated into specific work priorities and responsibilities in a Post-Huddle report.

The huddle's themes have been planned with great consideration to the project's objectives, the evolving community, and the milestones outlined in the Description of Work.

We believe this approach will insure both a continuity of purpose and a great capacity for the team to respond adaptively to the evolving needs of the Wikirate community.