# Mozilla Foundation 2020: Impact & KPIs

February 2016

This document explains how the KPIs in the Mozilla Foundation 2020 Strategic Plan fit into a larger story about the impact of our work. (See: http://mzl.la/2020)

## Contents

# Executive Summary

**Mozilla Foundation has a new strategy in place**. This strategy includes three thrusts: agenda setting; connecting leaders; and rallying citizens.  As we roll out this strategy, we need to get good at evaluating the strength of our programs and the impact of our work. This document outlines our plan to do this impact and evaluation work.

*Agenda*

**Impact:** our top priority issues are mainstream social issues, starting with online privacy, digital inclusion and web literacy.

> *Measures: citations of Mozilla / MLN members, public opinion*

*Advocacy*

**Strength:** Rally 10s of millions of people to take action and change how they -- and their friends -- use the web.

> *Measures: # of active advocates, list size*

**Impact:** People make better, more conscious choices. Companies and governments react with better products and laws.

> *Measures: per campaign evaluation, e.g., educational impact or did we defeat bad law?*

*Leadership*

**Strength**: build a cohesive, world class network of people who care about the open internet.

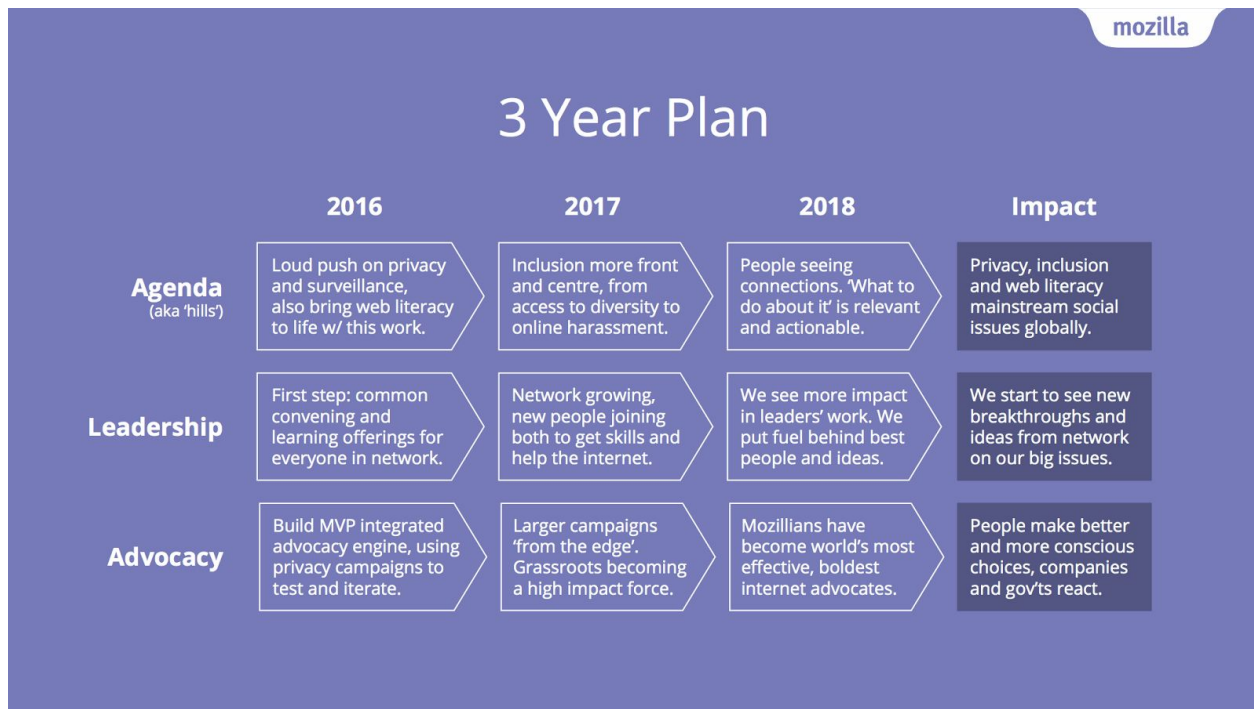> *Measures: network strength; includes alignment, connectivity, reach and size*

**Impact**: network members shape + spread the open internet agenda.

> *Measures: participation in agenda-setting, citations, influence evaluation*

*Explanations of these goals and plans to measure against them are included throughout this document.*

# Context from the Strategic Plan

To explain how the KPIs we included in our 2020 business plan fit into a bigger story about the impact of our work, the rest of this document describes how we will measure progress and success in relation to this strategy.

## Strategy Map

These are dark days for the open web. Monopolies. Fear. Surveillance. On the flip side, there is a new wave of open emerging, in the market and in a movement.

Mozilla needs to engage on both fronts — tackling the big problems but also fuelling the next wave of open. How?

**A. Shape the agenda**
Articulate a clear, forceful agenda. Start with privacy, inclusion and literacy over next 3 years. Focus MoFo efforts here first.

**B. Connect leaders**
Connect people who are motivated by this agenda. Get them doing stuff together, generating new, concrete solutions.

**C. Rally citizens**
Build a global force of 10s of millions of people who take action and change how they -- and their friends -- use the web.

Impact: **privacy, inclusion and literacy mainstream** social issues globally.

Impact: we **start to see new ideas and breakthroughs** on our big issues.

Impact: **people make more conscious choices,** companies and gov'ts react.

People everywhere experience **the next wave of openness and opportunity in online life** — they are empowered, safe and independent even as the complexity and scale of the Internet grows around us.

## 3 Year Plan

| | 2016 | 2017 | 2018 | Impact |
|---|---|---|---|---|
| **Agenda** (aka 'hills') | Loud push on privacy and surveillance, also bring web literacy to life w/ this work. | Inclusion more front and centre, from access to diversity to online harassment. | People seeing connections. 'What to do about it' is relevant and actionable. | Privacy, inclusion and web literacy mainstream social issues globally. |
| **Leadership** | First step: common convening and learning offerings for everyone in network. | Network growing, new people joining both to get skills and help the internet. | We see more impact in leaders' work. We put fuel behind best people and ideas. | We start to see new breakthroughs and ideas from network on our big issues. |
| **Advocacy** | Build MVP integrated advocacy engine, using privacy campaigns to test and iterate. | Larger campaigns 'from the edge'. Grassroots becoming a high impact force. | Mozillians have become world's most effective, boldest internet advocates. | People make better and more conscious choices, companies and gov'ts react. |

# What we mean by Impact & KPIs

As we dig into our new strategy, it is important that we get good at evaluating both the strength of Mozilla's programs and the impact of our strategy.

- KPIs and impact are related, but not the same thing.
- Often the impact we care about is hard to measure.
- Some KPIs are a proxy for impact, although mostly they are about 'strength'.
- Focussing exclusively on KPIs can be distracting from having the impact we want.
- Ignoring KPIs would be equally dangerous.

MoFo has been getting better at using KPIs to inform decisions. We need to make the same progress with understanding our Impact.

## Three Things We Need to Measure

A. **Strength** (operational KPIs)
B. **Short-term impact** (project outcomes / direct)
C. **Long-term impact** (global indicators / indirect)

**The KPIs in our 2016 Strategy are focused on (A)**

- There are our Operational KPIs. On their own, they do not indicate impact on the world. But a strong Mozilla is the necessary foundation for achieving (B) & (C).

| **(A) Strength** <br> Operational KPIs | **(B) Short-Term Impact** <br> Project outcomes / Direct | **(C) Long-Term Impact** <br> Global Indicators / Indirect |
|---|---|---|
| • Network Strength <br> • Active Advocates <br> • Citations | Direct outcomes <br> e.g. skills developed or a bad law defeated. | e.g., lower % of people feel fear / helplessness about online privacy |
| This data is essential, but not enough on it's own. These should be 'evergreen', even as the theme of our campaigns change over time. | We need to design impact goals and evaluation into our major projects. From there, we need to look back at our impact and track going forward. | We need to think at this scale, but acknowledge that many actors influence these indicators |
| **Pick your analogy...** | | |
| Fitness in the gym | Performance on the field | Position in the league / cup |

**Operational KPIs and impact measurement are distinct but related.**

- You need to know (A) to pick the right (B)
- The best executed projects (B) should have a positive impact on both (A) and (C)

## Where we are today

We have been learning from our existing use of KPIs (A) to drive our strategy

- We have been building capacity, and the culture to use data, but sometimes the KPIs have their own challenges
    - In End of Year fundraising we have used A/B testing to optimize our asks and donation flows, which has grown conversion rate and revenue. In 2015 we added surveys to better understand our donors' motivations and will use this qualitative data to inform future campaign design.
    - Our 10k Contributor Goal in 2014 inspired new work in data collection and analysis, and the knowledge gained (along with a shared goal for the year) shaped programme design. But, tracking community size without *depth of engagement* (and good systems) was de-motivating for some staff and did not give us a real understanding of the community.
- Our 2016 KPIs build on this experience, and the best practice of our peers in this area

Some MoFo programs already run impact evaluation (B) in response to the needs of funders

- Hive and Open News have both had some evaluation work done. More is underway for Open News and Science Lab right now.
- However, it is clear that we need to do much more work in this area: impact driven thinking and evaluation need to permeate our work, in the same way metrics has
- This will focus our strategy, tactics, and decision-making while giving staff the confidence and validation that their work matters

- This is not about justifying actions already taken, but instead finding opportunities for making our next actions better

We are not currently tracking long-term impact (C)

- The Shape of the Web effort led by John J and Harvey in 2013 attempted to look at these but lacked follow through : http://shapeoftheweb.mozilla.org/
- The current 'State of the Web' (title tbc) project is looking at this task in 2016, alongside other measurement work with the MoCo Marketing impact team

*We want to continually get better at investing our time, money, and energy on the activities that yield the highest impact return on investment.*

# Agenda-Setting

## 3 Year Plan

| | 2016 | 2017 | 2018 | Impact |
|---|---|---|---|---|
| **Agenda** (aka 'hills') | Loud push on privacy and surveillance, also bring web literacy to life w/ this work. | Inclusion more front and centre, from access to diversity to online harassment. | People seeing connections. 'What to do about it' is relevant and actionable. | Privacy, inclusion and web literacy mainstream social issues globally. |

*Goal: Online privacy, inclusion and literacy are mainstream social issues globally.*

## Status

Mozilla Foundation is an active thought leader in the open web movement today. By formalizing our approach, policies and KPIs in this area of our work we will increase the impact we have on our our priority hills.

## Agenda Setting Dashboard

| Main KPIs | Baseline | Target | Start |
|---|---|---|---|
| Citations | No baseline; Mozilla-related mentions in press, industry, academic, government publications in relation to priority hills. | TBD | 03/16 |
| **Sub KPIs** | | | |
| % of key influencer audiences (tbd) who associate Mozilla with priority hills | No baseline, need to define influencers | TBD - shared goal with Marketing | 06/16 |
| Mozilla Citations | No baseline, citations as above that mention hills + Mozilla by name | TBD | 06/16 |

| MLN Member Citations | No baseline, citations that mention hills + key MLN members by name | TBD | 06/16 |
|---|---|---|---|
| Social Media | No baseline (when tracked specific to hills) | TBD | 01/16 |

We will track who is citing Mozilla's position on privacy, inclusion and literacy, and how often. This will give us a proxy for whether our message is getting out there.

## Options for further impact evaluation

- Qualitative evaluation by interviewing the influencers who use our work to create change? Including those in the Mozilla Leadership Network.
  - e.g., Is our thought leadership work fuelling the movement? If so, how?
- Tracing the spread of ideas we pioneer (e.g., the term 'Web Literacy')
- Measuring the implementation / actions / programs that evolve from agenda-setting work, either within Mozilla, by the community, or by partners

Building capacity

- In areas like press mentions, social coverage, and citations, we will develop our capacity to extract more nuanced indicators of impact and influence, along the lines of academic 'Impact Factors.' In time, these may allow more complex KPIs, or act as a secondary layer of reporting to understand where our message is working best.

## Tracking global indicators ('State of the Web')

- We do not currently have long-term global indicators for our hills
- In 2016 we will build our Insights capacity and begin to identify these indicators, via the 'State of the Web' project
  - This will align with MoCo Insights team
  - We will work with partners, and build on existing research and data on these topics
  - We have started looking at what's currently being done by other organizations (see deck)
  - One example is the Pew Research on The state of privacy in America
    - Online privacy is already a mainstream issue for Americans

- ■ Given this, we should focus on an indicator within this, such as reducing % of people who feel powerless to protect personal privacy
- ● We will not move these global indicators alone -- but we are fuelling the movement that will move these indicators
    - ○ And: identifying and communicating the indicators is part of the work to fuel the movement (e.g., give everyone a needle we want to move together)

## Setting priorities

Our business plan sees us establish a 'Generic Mozilla Advocacy Engine' and a 'Generic Mozilla Leadership Network,' but we need a process for deciding which hills these functions are 'pointed at' over time.

- ● We need a process for setting priority hills, aligned with MoCo & partners
- ● This is an opportunity for involvement of the board
- ● There are several related workstreams underway:
    - ○ inventory of existing thought leadership across Mozilla
    - ○ writing draft issue briefs summarizing Mozilla themes (Privacy, Inclusion, Literacy, Internet as a public resource)
    - ○ mechanisms for community to influence agenda and preferences through State of the Web
    - ○ MLN "hubs," RFPs and awards

# Advocacy Engine



## Status

Our Advocacy programme to date has been run by a small team within MoFo who assemble on a per campaign basis (along with critical support from colleagues in MoCo). The work ahead moves us from an ad-hoc team, to a robust and scalable programme. This plan to build our capacity is reflected in our KPI targets and connects tightly to the MoCo marketing team plans to grow Mozilla as a brand/product.

## Are we getting stronger?

*Goal: Build a global force of 10s of millions of people who take action and change how they -- and their friends -- use the web.*

Strength / Operational KPI: 'Active Advocates'

Advocacy organizations around the world struggle with choosing KPIs that can separate 'lots of activity' from 'meaningful impact'. Learning from this (in particular Beyond Vanity Metrics) we have chosen a tough KPI that will track a relatively small number in relation to our total reach. Though the number feels smaller, the depth of these relationships is how we will create change in the world.

Mozilla overall needs to track against both the quality and quantity of relationships we hold. We believe the most effective way to do this is to focus the Advocacy team on a high-quality segment of our audience, while the MoCo Marketing team focuses on growing the overall list significantly (and faster than MoFo would do working alone).

*From Mozilla Foundation 2020: Strategic Plan*

Active Advocates
Each month, we measure how many people returned to Mozilla to take further advocacy actions. First time actions are not included in this count.

This is a deliberately tough KPI, chosen to incentivize:
- Excellent onboarding
- Stewardship & building long-term relationships (including regular donors)
- Building an enduring movement ready to take action as new issues emerge
- Growing the perception and understanding of Mozilla Advocacy as an effective movement

Sub KPIs include:
- List / audience size
- Engagement rate (email and other channels)
- Retention rate
- Frequency of campaigns
- % of audience relevant per campaign

This KPI will result in a relatively small number in relation to the total size of our audience and reach of our campaigns. We will also support our external storytelling and celebration of our campaigns with 'headline KPIs' including number of actions, and number of advocates.

Historic Active Advocate Numbers

We have not been tracking this KPI historically, but a look at historic advocacy data can help set a baseline.
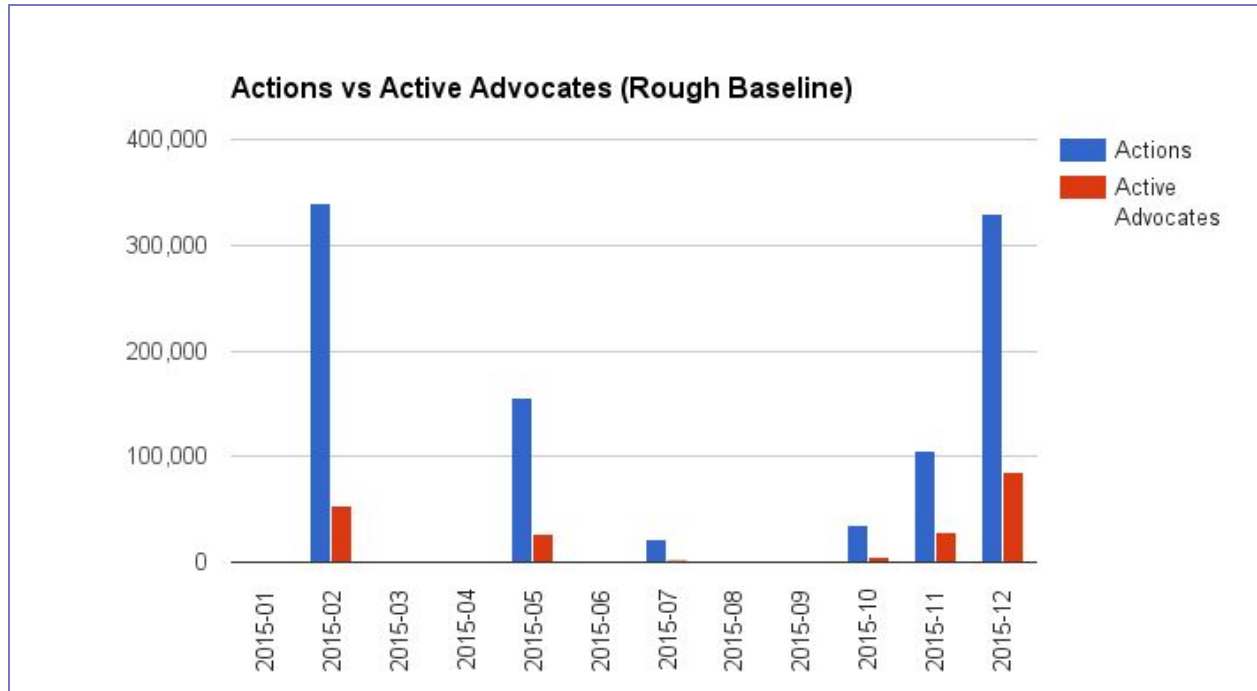


Feb = NN Petition, May = Surveillance Petition, July = DE Data Retention, Oct-Dec = EOY
(note: other advocacy actions were off site - e.g. whitehouse petition)

Looking at activity during focussed campaign months, we can see the total number of actions (either petition signatures or donations). Then by removing 'first time actions' from the same month, we can estimate the number of Active Advocates.

## Historic List Growth
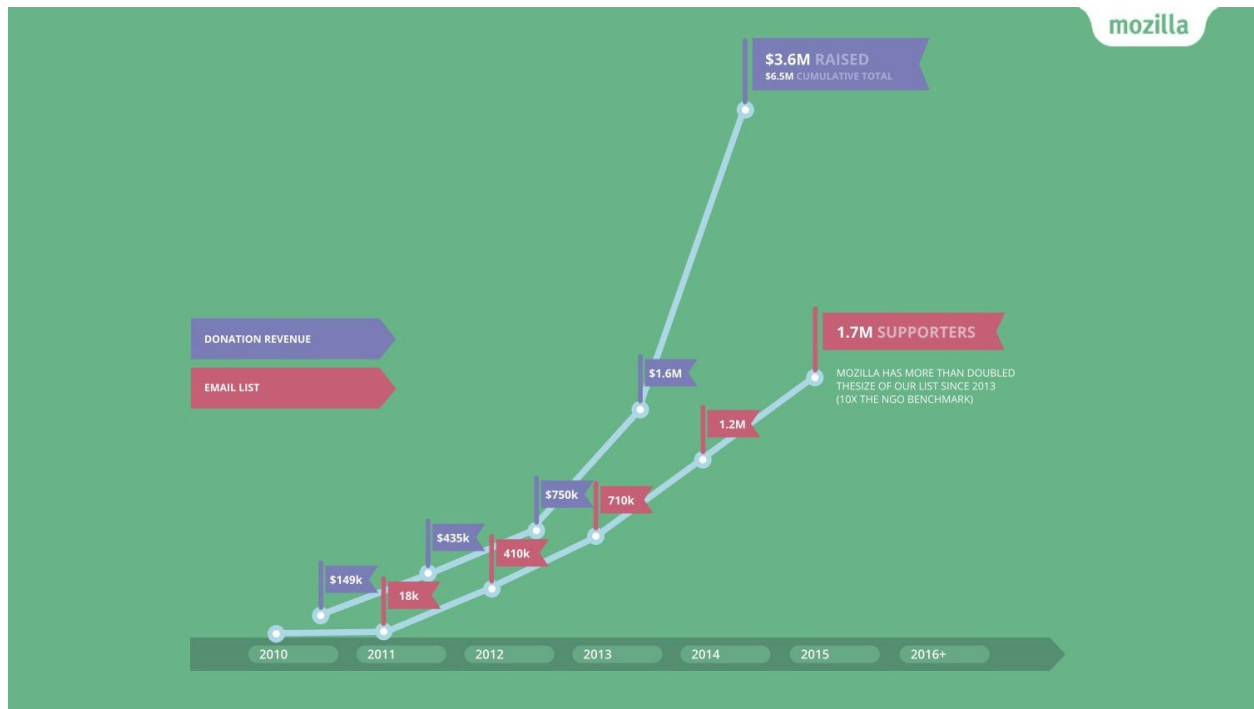


## Advocacy Dashboard

| Main KPIs | Baseline | Target | Start |
|---|---|---|---|
| Active Advocates | 2015:<br>● 86k peak during EOY<br>● 25-55k during major campaigns<br>● 0 on non campaign months | 116k (1%) of list during peak month | 01/16 |
| List Size (Mozilla) | 5.8M | 11.8M | 01/16 |
| Small Dollar Revenue | 2015: $4.3M | 2016: $4.5M | 01/16 |
| **Sub KPIs** | | | |
| List Size (MoFo) | 1.7M | N/A, target is tied to Mozilla list | 01/16 |
| Engagement Rate | List to action rate: 3.1%<br>Based on NN and Section 215 US Campaigns | 3.1% | 01/16 |
| Retention Rate | Not tracking precisely<br>Approx 5% for EOY / list size | TBD | 01/16 |
| Campaign Frequency | 4 x US Advocacy actions<br>(NN petition, 2 x Surveillance petition, Surveillance Tweet) | 8 x advocacy campaigns | 01/16 |

| | 1 x German Advocacy campaign (data retention)<br><br>End of Year Fundraising Campaign | 2 x rapid-response advocacy campaigns<br><br>2 x fundraising campaigns | |
|---|---|---|---|
| % of audience relevant per campaign | 4 x Advocacy campaigns reached 25% of EN list (US residents)<br><br>Fundraising campaign reached 100% of EN list<br><br>No existing audience for DE campaign (began building a new list) | TBD, working through w/ advocacy | 01/16 |

Growing the number of Active Advocates over time:

The following plan shows the kind of growth we are aiming for. The precise targets will shift over time, but the model demonstrates our ambition for scale. As we build our capacity and better engage the supporter base we will convert an increasing percentage of the broader Mozilla list into Active Advocates. By combining our focus on quality advocacy action with Marketing's ambitious list growth goals, we anticipate a steep ramp-up in activity in the next three years.

| | List Size<br>Quantity<br>Owned by<br>Marketing | Active Advocates<br>Quality<br>Owned by Advocacy | Notes |
|---|---|---|---|
| Baseline | 5.8M | 86k peak during EOY<br>25-55k during major campaigns | Total list co-owned with Marketing. MoFo list is (~2M) |
| 2016 | 11.6M | 116k<br>1% of total list | Assumes we grow Mozilla / Firefox lists w/ Marketing. And that we have access for certain advocacy actions |
| 2017 | 25M | 625k<br>2.5% of total list | List size is extrapolation based on 2018 goal in MoCo Marketing plans. |
| 2018 | 45M | 2.25M<br>5% of total list | This is list size target in MoCo Marketing plan. |

Impact on how we work
- Our growth goals will
    - help us choose which campaigns we run
    - force creative and highly leveraged campaign designs
- Tightening the feedback loop for measuring our impact is intended to motivate staff, and helps us learn from every campaign

## Tracking External Impact: Are we winning?

*Goal: People make better, more conscious choices about how they use the web. Companies and governments react with better products, policies and laws.*

### Developing an Impact Evaluation process

We will invest in our capacity to evaluate advocacy impact of Mozilla on a per campaign basis. The impact goals of our Advocacy work will vary with our hills, and we will match our impact evaluation approach to the specific goals of each activity.

### An example
We have started 2016 by running an impact planning and evaluation process for our upcoming Encryption Campaign.

Our impact goals are:
- 50k people explicitly commit to take action to prevent future government attempts to undermine encryption (we are priming our advocates for future legislative battles)
- A state change in our existing supporters level of understanding of the purpose and importance of encryption in their everyday lives
    - This will be measured using pre and post campaign surveys of a sample of the population
    - We are collecting supporters written definitions about 'what encryption is' and 'why encryption is important'
        - We will evaluate how this language changes during the campaign

■ And use insights from our current supporters 'voice' to frame the content we develop during the campaign

● We will also run post campaign evaluation with new advocates to look for indicators of change caused by the campaign and their motivations for getting involved

● Encryption Campaign KPIs in full: http://mzl.la/1PSwLIQ

## Over Time

Over time, the process of planning for specific impacts in our campaigns, and sharing the results of our evaluations will:

● Give the executive team better tools to compare and evaluate future campaign proposals before making investment decisions

● Gives the advocacy team clearer goals to focus their work on higher impact activities

# Mozilla Leadership Network



## Status

The Mozilla Leadership Network as a named entity that members can self-identify with doesn't yet exist. It will initially be formed from many existing networks with existing distinct statements of purpose. This transition to a network that is more deliberately directed by Mozilla will take time.

## Are we getting stronger?

*Goal: build a cohesive, world class network of people who care about the open internet.*

### Strength / Operational KPI: 'Network Strength'

Our Network Strength KPI reflects several important goals.

1. Tracking and guiding our progress towards a more Mozilla aligned network, and understanding which clusters within the network are ready to support our work on privacy, inclusion and web literacy.

2. Understanding the health of the network, so that we can make deliberate interventions to increase its resilience and effectiveness. This is about limiting silos and bottlenecks that could be points of weakness.

3. Tracking the influence capacity of the network. This will inform future growth strategies including a targeted Executive programme.

*From Mozilla Foundation 2020: Strategic Plan*

Network Strength
A measure that captures the health, resilience, size and influence of the network.
Factors that contribute to Network Strength (sub KPIs):

1. Network Alignment -- How strongly members identify with Mozilla and our hills
2. Network Connectivity -- Number and strength of connections between members
3. Network Size -- Number of active members
4. Member Influence / Reach -- Using our leadership tiers

*Also to monitor:*
- Shape of the network -- Absence of silos. Resilience vs dependency on key nodes. This won't directly affect the KPI, but is important to understand.

Rationale and considerations
- This proposal is based on best practices outlined in The State of Network Evaluation
- This work will give us more than a KPI. It will enable us to see the network and use the visualizations to inform program design, convenings, etc.
- We do not have historic data for this KPI, so cannot yet set useful targets. After establishing baseline data in H1, we aim to set initial targets in H2.

## How the KPI adds up

The formula will need careful design, but in simple terms:

- It is valuable to add a new member to the network (+ size)
  - It is more valuable, the more aligned they are with Mozilla (+ alignment)
  - It is more valuable, the more hills they want to work on (+ alignment)
  - It is more valuable, if they are connected to other members of the network and collaborating with them (+ connectivity)
  - It is more valuable, if they hold a position of greater influence (+ influence)

## Growing our Network Strength

Network strength can be increased with targeted work in any of these areas:
- Increasing alignment of existing members (membership)
- Connect more members of the network (convening)
- Adding new members (membership)

● Recruit / connect / increase alignment of influential members (executive tier)

The overall network strength indicator is new data for us, so we don't have a baseline, but we can set a level of ambition for growth.

We will also track network size as a part of overall Mozilla-wide participation and contributor numbers. We will have a baseline for this. We are not focused on growing this number in 2016 but rather on network quality. In fact, the number may even go down as we put more demands on the network and get more rigorous about who we count.

Leadership Dashboard

| Main KPI | Baseline | Target | Start Date |
|---|---|---|---|
| Network Strength | No baseline. KPI includes:<br>　　Alignment (on key issues)<br>　　Size (opted in members)<br>　　Connectivity (between members)<br>　　Reach (secondary connections)<br>Doing survey in 02/16 to baseline. | TBD | 06/16 |
| Citations | Press etc. mentions that contain both our members and our issues. | TBD | 06/16 |
| Mozilla Contributors | [George to baseline] | [George to target] | 01/16 |
| Revenue: Grants | 2015: $7.9M | 2016: $8.1M | 01/16 |
| **Sub KPIs** | | | |
| Network Size | ~5k people have contributed to our work *but this number may shrink as we define membership and MLN boundaries* | #TBD: Active leaders contributes to Mozilla Contributor number | 06/16 |
| Network Alignment | Not measuring yet | TBD, tied to working on 'hill's | 06/16 |
| Network Connectivity | Not measuring yet | TBD, pilot w/ Science in 02/16 | 06/16 |
| Member Influence | Not measuring yet | TBD, focus on execs / champions | 06/16 |

Impact on how we work

- Discretionary budget can be increasingly spent on projects or parts of MLN that result in the most alignment with Mozilla goals.
- We want Network Strength to affect management & funding decisions. Things will get attention/money/focus if we believe they will drive this KPI forward.

Establishing baseline data for Network Strength

Important Note: Our overall Network Strength KPI will only become meaningful when the membership proposition is developed, and the identity of the network is established. Until members can self-identify as such, the evaluation techniques to assess network health at an org-wide level are limited.
However, there is work we have begun in order to gather baseline data about membership of existing network hubs which can also act as market research in the design phase of the MLN membership proposition.

Q1

- Launch lightweight network mapping surveys of existing network hubs. Also, briefly describe MLN and ask respondents about interest in 'joining'.
- Build network maps and use these to engage staff and members of the network in the design of programmes and development of MLN
- Mozilla Science Lab and OpenNews are each initiating a network mapping project with Network Impact (whose work informed our KPI design)

Q2:

- Convene people working on Network Evaluation (funders & peers)
- Use the research phase as part of the strategy to introduce the new MLN to existing communities
- Experiment with multiple layers of community data to expand our network map with real-time activity (twitter, github, participation tools etc)

# Tracking Impact: Are We Winning?

### *Goal: network members shape + spread the open internet agenda.*

We have a theory that a stronger, more aligned network will collectively shape the agenda. This is the impact we'll measure over time. As we align, focus and listen to our network, our collective agenda will get clearer and will then spread out into the world.

## Developing an Impact Evaluation process

In the short term
- We will start building ways to listen to and get our network to participate in our agenda work. This will feed 'State of the Web' and inform the design of the network.
- We will continue to learn from existing evaluation projects, and use this knowledge to sharpen our programmes.
- And we will invest time in better sharing this knowledge within the network to enable cross pollination of ideas between hubs.

In the longer term (once the network has an identity and membership proposition)
- We will track external impact through citations (members talking about our issues) and public opinion (are our issues becoming mainstream?).
- We will develop impact planning and evaluation processes for our major campaigns and activities.