

# Advancement Tuning Session Q1 FY20-21



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FOUNDATION

# Efficacy and Resilience OKRs



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# Partnerships



**Objective: Maintain WMF’s relationships with large-scale external entities, while testing and seeding new partnership models in support of the annual and mid-term plans.**

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## **Worldwide Readership: Growing Readership (W-O6-D3)**

- India | Jio: Wikipedia app expected to reach 110M JioPhone users; 1.5M downloads to-date.
- Colombia | Ministry of Education: [COVID-19 Wikipedia lesson plans](#) preloaded and distributed to 83,000 students
- Africa | WorldReader and Right for Education integrating [Preview](#), expected reach: >16M new readers, 45 countries
- Global | WHO: Licensing agreement and ~200 COVID-19 files to be uploaded on Wiki; announcement last Thursday

## **Brand: Elevate WMF Brand (B-O4-D22)**

- Global | Google: Wikipedia app in “Featured Collection” on Play store, expected 4M impressions, 50K app installs
- Global | Amazon: Alexa attribution up from 10% to 100%; listeners prompted to donate after listening to >2¶
- Global | UNICEF: “Voices of Youth” mediathon with 100 young leaders creating CC content on “life after COVID”

## **Thriving Movement: Community Programs (T-O12-D1) and Attract & Retain More Diverse Editor Base (T-O8-D3)**

- Philippines, Morocco, Bolivia | *Reading Wikipedia in the Classroom*: PH >1,000 teachers, MA >45, BO: 100
- MENA, India | *The Wikipedia Library*: Agreements signed with 2 publishers opening access to >115K articles for Arabic and Indic-language speaking editors

**Target quarter for completion:** Q4 FY20-21

Department:  
Advancement

# Partnerships



## Key Results

	Year Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
Test a minimum of <b>3 new partnership models</b> in support of the 5 MTP priority areas in order to provide recommendations to the foundation for partnership implementation at scale  <b>Baseline:</b> 0 models tested	3	1	-	-	-
Deliver best-in-class partnerships support to WMF departments, as measured by a <b>Net Promoter Score</b> of 70 or higher  <b>Baseline:</b> 0 NPS score	>70	Measured Semi-Annually (Q2 and Q4)	-	-	-



# Drill Down: Partnerships



## The situation

In the spirit of “**widening the aperture**” at the ecosystem level, we are exploring closer partnership with key “**Big Open**” orgs (i.e., Creative Commons, Internet Archive, Mozilla).

We are also exploring deeper integration with the Community Programs team on **GLAM, Education, and civil society engagement**.

## The impact

- **Counterbalance** to WMF’s focus on big tech partnerships, and support for the open knowledge ecosystem and being better partners to aligned orgs.
- **Leveraging the power of our collective network** and our own position of power (relative to smaller partners) in the tech landscape.
- **More intentional approach** to designing partnerships that involve calls to action and community collaboration (e.g., Campaigns)

## The recommendation

- (Re)established centralized relationships with CC, IA, and Mozilla.
  - **Ask:** if you have existing relationships that you want maintained on behalf of WMF, connect them to Partnerships.

### Next steps:

- Identify 1-2 areas of 1-to-1 collaboration for FY20-21
- Collaborate with all three orgs on strategic opportunities to influence the internet landscape
  - **Ask:** if you have asks / wishlists, reach out to Partnerships!
- Collaborate more closely with Community Programs

# Open Knowledge API (Okapi)

**Objective: WMF has a clear path towards increased organizational sustainability, with a business strategy and revenue roadmap tied to the launch and sale of a Professional API product to at least 2 paying customers.**

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- **Community consultation roadmap completed.** First consultation to gather community perspective on principles and values that should guide the project.
- **Key questions regarding the go-to-market plan have begun to get answered.** 18 potential customers and partners interviewed to understand customer needs. Initial target customer list developed. Product packaging options have been outlined.
- **Alpha product nearing completion.** First version ready by the end of October.
- **Beta partner agreement in progress.** Working with Partnerships to sign our first major scale beta customer.

**Target quarter for completion:** Q4 FY20-21



# Open Knowledge API (Okapi)



## Key Results

	Year Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
<p><b>Q1: Develop and validate an initial business strategy</b> Q2: Develop a customer pipeline with a minimum of 5 soft commitments to a specific product and price point Q3: Develop a model for the distribution of revenue across the Foundation, the endowment, and the community Q4: Close at least 2 paying customers <b>Baseline:</b> 0% complete</p>	100%	15%	-	-	-
<p><b>Q1: Deliver a commercially functional alpha product</b> Q2: Support at least one partner organization in using a beta offering in order to validate product value Q4: Ensure launch product is robust enough to support at least 2 paying customers <b>Baseline:</b> 0% complete</p>	100%	20%	-	-	-
<p><b>Q1: Develop a community engagement roadmap</b> Q2: Complete legal review of business and revenue strategy, approved by KPMG Q3: Complete community engagement roadmap, in order to ensure modifications based on feedback are in place by end of Q4 and draft terms of service and/or agreement templates for service engagements <b>Baseline:</b> 0% complete</p>	100%	25%	-	-	-

# Revenue



## Objective:

**Engage readers to become donors and deepen our relationship with existing donors to support a vibrant and sustainable Wikimedia Foundation**

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The fundraising team exceeded the Q1 revenue target.

Some of the high priority work delivered includes:

- First fundraising campaign in India
- Transition to virtual major donor events
- Published [fundraising report FY 2019-2020](#)
- Hiring
- Prep for Q2 English campaign

**Target quarter for completion:** Q4 FY20-21





# Revenue



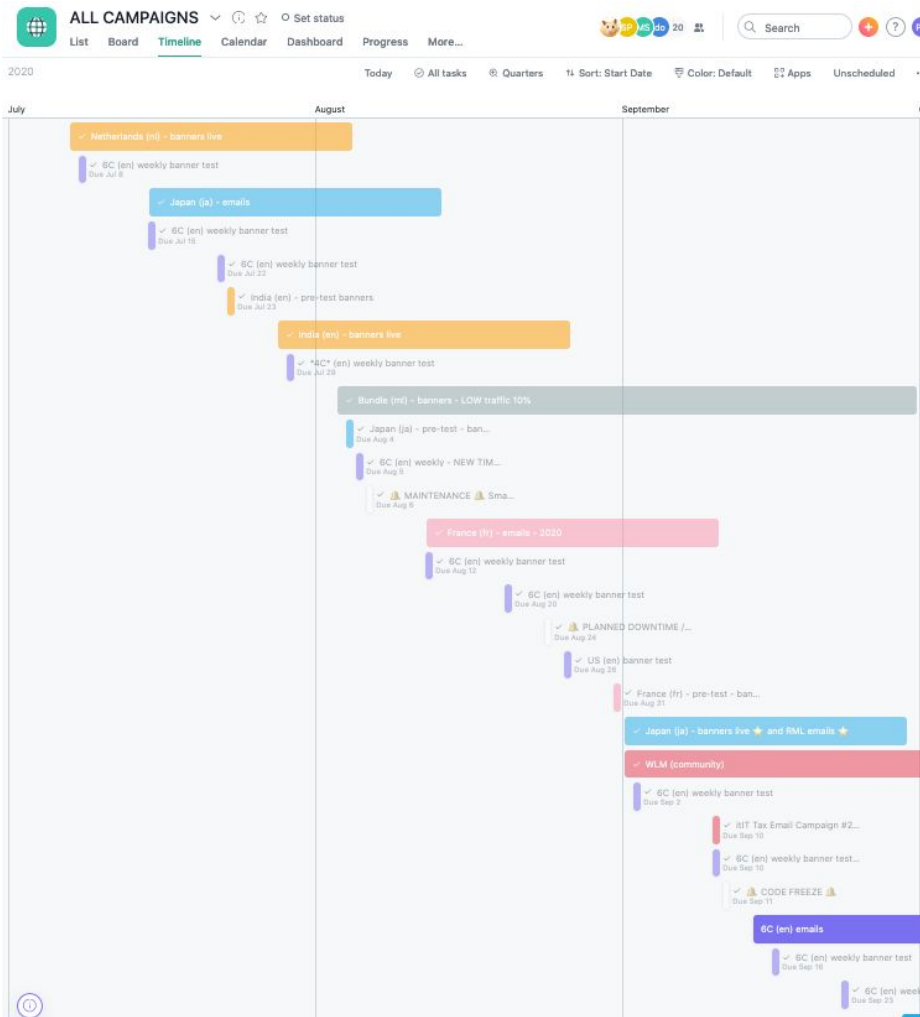
## Key Results

	Year Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
Raise \$108 million for the Foundation <b>Baseline:</b> \$0	\$108 million	\$42 million	-	-	-
Raise \$15 million in online gifts in Q1. (Raise \$88M Q1-Q4) <b>Baseline:</b> \$0	\$88 million	\$37.2 million	-	-	-
Raise \$1.25 million in major gifts in Q1 (Raise \$10 million Q1 -Q4) <b>Baseline:</b> \$0	\$10 million	\$3.8 million	-	-	-
Raise \$5 million for the Endowment in 2010-21 FY <b>Baseline:</b> \$0	\$5 million	\$1.2 million	-	-	-
Raise \$10 million from chapters in 2020-21 FY <b>Baseline:</b> \$0	\$10 million	\$950K	-	-	-
5+ online major donor events in Q1 & Q2 <b>Baseline:</b> 0 online events	5 events	2 events held	-	-	-
135 planned giving commitments <b>Baseline:</b> 0 planned giving commitments	135	58	-	-	-

# Department Update



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# Online Fundraising

It was a  
**BUSY** quarter!

# Online Fundraising

- **Raised \$37.2M, exceeding quarterly goal. On track towards fiscal year goal of \$88 million.**
- Ran campaigns in India, Japan, Netherlands, France and EU Bundle, alongside weekly English countries tests. Started our English Email campaign in our 6 main English markets. Extra busy quarter with campaigns originally scheduled for Q4, but were pushed to Q1.
- Improved our recurring donation flow by enabling automated updates on donations with expiring credit cards.
- Prioritized hiring, documentation and team resilience
  - New hire : Noah Israel, Sr. Email Campaign Manager (req)
  - New hire : Haley Nordeen, Banner Production Associate (req)
  - Huge help from Admin friends! Thanks, Janna, Tomas and Leticia!!



# Fundraising Operations

## Donor Services

- Managed a high volume of donor inquiries and supported complex campaigns in India, Japan, the Netherlands, France and the EU Bundle, alongside weekly banner tests in English countries.
  - Responded to almost **28,000 donor inquiries in September** alone
  - **168% increase in solved donor tickets** over the quarter compared to Q1 FY1920
- Collaborated closely with the email team to support English email campaign launch
- Prepared for Q2 by focusing on training, cross team collaboration, team resilience, and improving processes and workflows



# Fundraising Operations

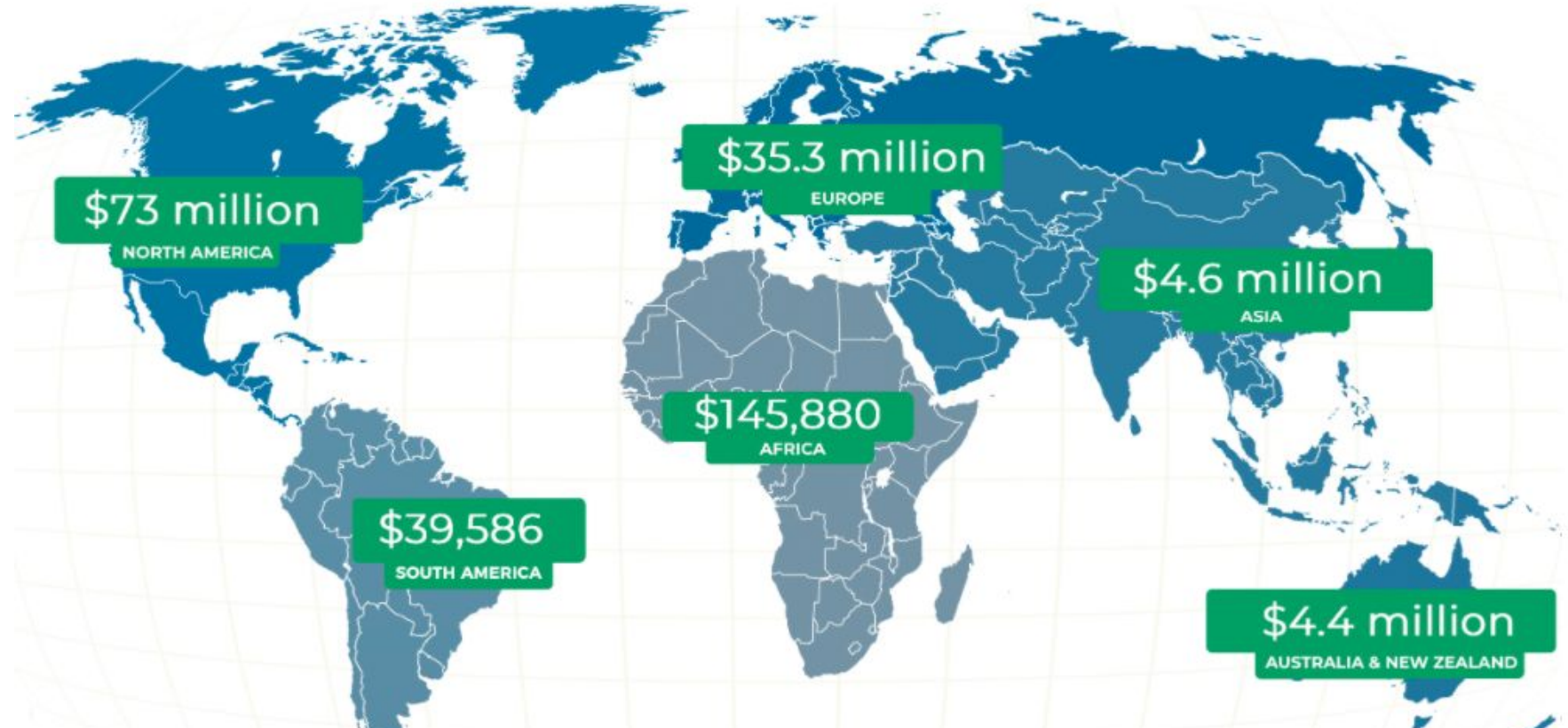
## **Analytics and donation processing**

- Improved reporting structure (Superset) to monitor campaign trends, provide the fundraising teams with insights and support financial reconciliation
- Collaborated closely with the email team to support email campaign reporting needs and segmentation strategy
- Transitioned donation processing from Major Gifts to Fr-Operations
  - Hired Melanie Demos, Fundraising Operations Associate (contractor), to support this work
  - Received much appreciated help from our friends in the Admin team - thank you Sasha!



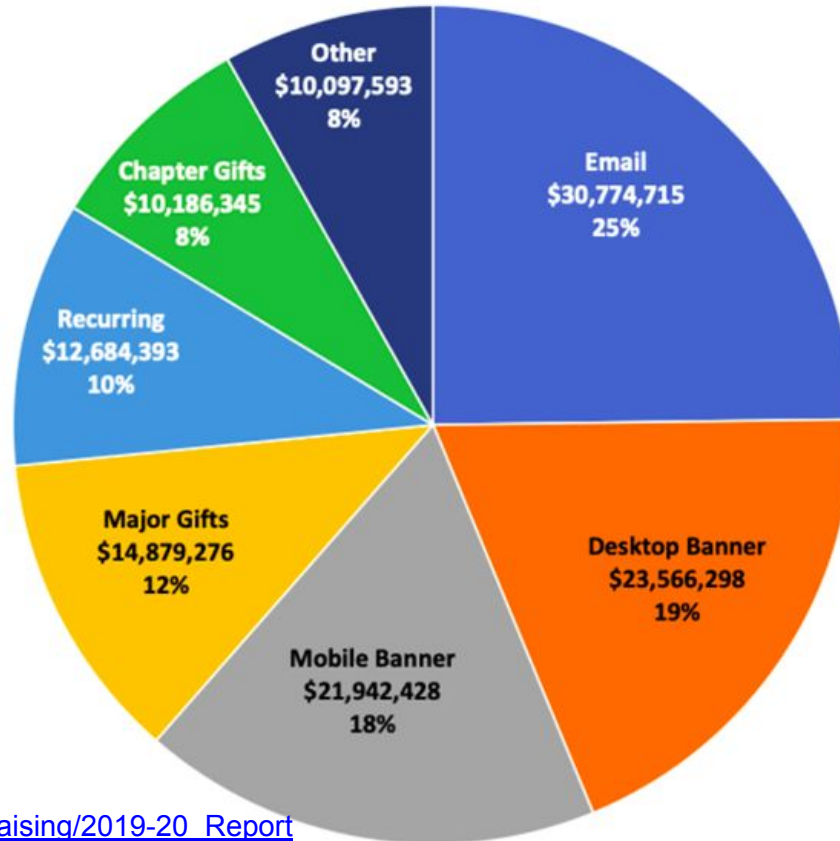
# 2019-2020 Fundraising Report

## Donation Totals by Continent



# 2019-2020 Fundraising Report

Amount by Channel





# Major Gifts & Foundations

**Objective: Secure donations from and engage with high capacity individuals and funding organizations to support a vibrant and sustainable Wikimedia Foundation.**

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- **Raised: \$3.8M, exceeding quarterly goal. On track towards fiscal year goal of \$10 million.**
  - Thank you Sasha and admin team!
- **Implemented transition to virtual fundraising events.** Hosted 2 of 5 events toward AP Fundraising OKR.
  - Thank you to Nikki Maller, IT Services, Communications, Grant, Janeen, and Katherine
- Near finalized transition of non-major gift donation processing to Fundraising Operations team, freeing team to increase focus on core work
- Prioritized hiring, documentation and team resilience
  - New hire: Sheyna Daniels, Lead Major Gifts Manager (requisition number holder)



# Endowment

**Objective: Build the Wikimedia Endowment fund and planned giving commitment pool to help create a sustainable future for the Wikimedia movement.**

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## **Gifts for Today (cash goal)**

\$5M goal for FY20-21

- Raised \$1.2 million (Q1 goal was \$1 million)
- Includes \$1 million gift from [Amazon](#) - third year in a row Amazon has supported the Endowment at this level
- Endowment total is now \$64 million (initial goal is \$100 million)
- Work is underway to investigate possible new structure for Endowment, e.g., 501(c)3

## **Gifts for Tomorrow (legacy commitments)**

135 goal for FY20-21

- Secured 58 commitments (Q1 goal was 10)
  - 22 of these came from [FreeWill](#)
- Integrating planned giving into more communications



# Fr-tech

**Objective: Advancement can run high revenue campaigns and prepare for Q2 English campaigns**

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**Technical systems are ready and stable for Q2.**

- Rebuilt credit card processor (Adyen) payment flows
- Worked on top bugs and maintained payment systems
- Prepared payment system for higher than normal Q2 traffic

**Prep for Q2 campaigns by making monthly convert configurable for all English donors.**

- Deprioritized for live campaign support

**Prepare campaign readiness checklist for future campaigns and test with India campaign**

- Developed and run on India and French campaigns
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# Questions



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# Appendix



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# Acronyms

**APP:** Annual Planning Process

**OKAPI:** Open Knowledge Application Programming Interface

**EU Bundle:** Group of selected European countries brought together in one campaign

