Advancement Tuning Session
Q2 FY20-21
MTP Priority slides
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.

Worldwide Readership: Growing Readership (W-O6-D3)
- Global | Following the launch of the Jio app in September (2.4M downloads), we supported Inuka to make the app available to all KaiOS devices in 15+ countries reaching a potential 20M users. The app was released December 7th and active marketing promotion will begin mid-January. 23K downloads.
- Global | Wikipedia app now available on Huawei App Gallery, used by more than 750M people worldwide; secured $1.5M in co-marketing to promote downloads in 6 priority markets: Indonesia, Philippines, Vietnam, Kenya, Nigeria, and Kazakhstan, with goal of securing 10M downloads by EOY (45K in first days).

Thriving Movement: ARMDEB (T-O8-D3), Address Knowledge Gaps (T-O12-D3), Community Programs (T-O12-D1)
- MENA | Nonprofit Ideas Beyond Borders will pilot a university-based Wikipedia editing program for replication across the region. The goal is of the project is to create a critical mass of content and recruit first-time editors to bring AR-Wiki to maturity. More in the drilldown slide.
- Africa | Worked with SouthSouthNorth, CDKN, and the Campaigns team to create a training toolkit for 76 African climate change researchers and activists: >120 new editors, 4K total edits, and 3M views.

Platform Evolution: Content Evolution (P-O14-D4)
- Secured $25K in Azure credits to support the anti-terror work being done by WMF’s Trust & Safety team, allowing us to use Microsoft PhotoDNA to scan the ~60M images on Commons and ensure compliance with Wiki policies

Target quarter for completion: Q4 FY20-21
<table>
<thead>
<tr>
<th>Key Results</th>
<th>Year Goal</th>
<th>Q1 Status</th>
<th>Q2 Status</th>
<th>Q3 Status</th>
<th>Q4 Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test a minimum of <strong>3 new partnership models</strong> in support of the 5 MTP priority areas in order to provide recommendations to the foundation for partnership implementation at scale</td>
<td>3</td>
<td>1</td>
<td>2</td>
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<tr>
<td><strong>Baseline:</strong> 0 models tested</td>
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<tr>
<td>Deliver best-in-class partnerships support to WMF departments, as measured by a <strong>Net Promoter Score</strong> of 70 or higher</td>
<td>&gt;70</td>
<td>Measured Semi-Annually (Q2 and Q4)</td>
<td>91</td>
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<tr>
<td><strong>Baseline:</strong> 0 NPS score</td>
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## Drill Down: Partnerships

### About this Partnership
- **University-based translation program** with Ideas Beyond Borders (IBB), aimed at creating Arabic Wikipedia content and testing editor recruitment and retention strategies.
- Pilot will run in Iraq in Y1 and be replicated in Y2 in Jordan, Morocco, Lebanon and Egypt.
- Program will build on lessons of GLOW, improving content campaigns model and testing a new model for replication and scale.

### GLOW: Lessons Learned
- India campaign was a huge success; other campaigns did not materialize or resulted in negligible growth (e.g. Indo)
- Lesson: Successful implementation requires involvement of professional external partners with deep local context (e.g., CIIS on Indic languages)
- GLOW increased active editors on Indic wikis by 15% during contest, but did not add new editors or sustain activity
- Lesson: Use of on-wiki outreach tools and lack of retention strategy may have capped new editor growth (e.g., tapping existing pool vs. widening the funnel)

### IBB: Revised Model
- WMF to fund IBB, which has a track record of working with the Arabic Wikipedia community and running smaller-scale editathons, to run the logistics and implementation of the year-long campaign
- Pilot will seek to attract new editors to the movement, with new strategies for recruitment and deeper engagement over time.
- Students will be integrated to their local Wiki community; participate in seminars and training activities; and receive one-to-one guidance.
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.

- **Alpha product launched.** Initial version shared with major potential partners for exploration and feedback.

- **Business strategy finalized.** Detailed customer segmentation plan has been developed and initial customer set has been decided. Product packaging and pricing options for this customer set have been developed and vetted.

- **Community overview essay ready to go.** To be released in early February, to update the community on the plan and progress of the Okapi project and to gather community perspective on principles and values that should guide the project.

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<th>Q3 Status</th>
<th>Q4 Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1: Develop and validate an initial business strategy</td>
<td>100%</td>
<td>15%</td>
<td>30%</td>
<td>-</td>
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<td>Q2: Develop a customer pipeline with a minimum of 5 soft commitments to a</td>
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<td>specific product and price point</td>
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<td>Q3: Develop a model for the distribution of revenue across the Foundation,</td>
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<tr>
<td>the endowment, and the community</td>
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<tr>
<td>Q4: Close at least 2 paying customers</td>
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<tr>
<td><strong>Baseline:</strong> 0% complete</td>
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</table>

| Q1: Deliver a commercially functional alpha product                       | 100%      | 20%       | 30%       | -         | -         |
| 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                                                               |           |           |           |           |           |
| **Baseline:** 0% complete                                                  |           |           |           |           |           |

| Q1: Develop a community engagement roadmap                                 | 100%      | 25%       | 50%       | -         | -         |
| Q2: Complete legal review of business & revenue strategy, approved by     |           |           |           |           |           |
|    KPMG                                                                    |           |           |           |           |           |
| Q3: Complete community engagement roadmap                                  |           |           |           |           |           |
| Q4: Ensure modifications based on community feedback are in place          |           |           |           |           |           |
| Q4: Draft terms of service and/or agreement templates for service         |           |           |           |           |           |
|    engagements                                                             |           |           |           |           |           |
| **Baseline:** 0% complete                                                  |           |           |           |           |           |
The situation
We made a significant change to our business strategy in terms of customer focus in Q2, based on developing a better understanding of our potential customer base as well as our organizational priorities.

We are now focusing exclusively on the Big Five (Facebook, Amazon, Apple, Microsoft, and Google) as our initial target customers, which means the entirety of our potential customer base at this time is five customers total.

The impact
This is a positive development from a business perspective, as it allows us to tighten our sales efforts. However, this type of customer is not likely to make a “soft” commitment, as they require a longer and more formal sales process.

As a result, we are unlikely to reach our Q2 key result of five “soft” customer purchase commitments at any point this year.

Recommendation
Acknowledge that the Q2 key result of “Develop a customer pipeline with a minimum of 5 soft commitments to a specific product and price point” was based on an incorrect assumption, and therefore is at risk, but that the follow-up Q4 key result goal to “Close at least 2 paying customers” remains on track.
Objective:

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

Some high priority work includes:

- Exceeded English campaign target ahead of schedule
- Transitioned banner campaign to Endowment banners
- Virtual major donor events
- Payment redundancy: 1st campaign with 100% redundancy for payment processing
- Launched a donation match partnership with Plant Your Change to plant 400,000 trees

Target quarter for completion: Q4 FY20-21
## Key Results

<table>
<thead>
<tr>
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<th>Year Goal</th>
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<th>Q3 Status</th>
<th>Q4 Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raise $125 million for the Foundation (revised goal from $108M)</td>
<td>$125 million</td>
<td>$42 million</td>
<td>$124 million</td>
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<tr>
<td><strong>Baseline:</strong> $0</td>
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<tr>
<td>Raise $94 million in online gifts by end of Q2. (Raise $105M FY - revised goal from $88M)</td>
<td>$105 million</td>
<td>$37.2 million</td>
<td>$101.4 million</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Baseline:</strong> $0</td>
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</tr>
<tr>
<td>Raise $7.8 million in major gifts by end of Q2 (Raise $10 million FY)</td>
<td>$10 million</td>
<td>$3.8 million</td>
<td>$12.2 million</td>
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<td>-</td>
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<tr>
<td><strong>Baseline:</strong> $0</td>
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<tr>
<td>Raise $5 million for the Endowment in 2010-21 FY</td>
<td>$5 million</td>
<td>$1.2 million</td>
<td>$17.5 million</td>
<td>-</td>
<td>-</td>
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<tr>
<td><strong>Baseline:</strong> $0</td>
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<tr>
<td>Raise $10 million from chapters in 2020-21 FY</td>
<td>$10 million</td>
<td>$950K</td>
<td>$10.8 million</td>
<td>-</td>
<td>-</td>
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<tr>
<td><strong>Baseline:</strong> $0</td>
<td></td>
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<tr>
<td>5+ online major donor events by end of FY</td>
<td>5 events</td>
<td>2 events held</td>
<td>5 events held</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Baseline:</strong> 0 online events</td>
<td></td>
<td></td>
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<tr>
<td>135 planned giving commitments</td>
<td>135</td>
<td>58</td>
<td>697</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Baseline:</strong> 0 planned giving commitments</td>
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Fr-tech

Objective: Advancement can run the main Q2 fundraiser

Update process and participate in cross team emergency planning and response.
- Updated documentation
- Facilitated cross team meetings
- Ran on call schedule and responded to emergent issues

Model impact to queues in peak donation periods and prioritize possible improvements.
- Implemented dashboards and tracking analytics
- Added features and improvements through Q2

Actively manage the donor payment experience during peak donations in the first half of December.
- Prioritized and acted on emergent issues
- Achieved a record-breaking 5min process time at peak donation volumes.
Online Fundraising

Total amount raised towards Annual Fund online

- **FY1516**
- **FY1617**
- **FY1718**
- **FY1819**
- **FY1920**
- **FY2021**

**Total amount raised Online**

**Q1 & Q2 FY2021**: $101M (all campaigns)

**Q1 & Q2 FY2020**: $79M

+28%
Online Revenue by channel
English campaign Q1 & Q2

- Email: $26.6M (32.6%)
- Desktop Banner: $22.4M (27.4%)
- Mobile Banner: $19.0M (23.2%)
- Recurring: $6.9M (8.4%)
- Portal, Social, App.: $6.8M (8.4%)

Each section represents a percentage of the total revenue.
### English campaign Annual Fund Email

“**You are one of those rare exceptions**”

“..you were among the extremely rare donors who made a donation to invest in a future where everyone can access fact-based and unbiased free knowledge.”

“We choose not to charge a subscription fee and we always prioritize your privacy over profits..”

<table>
<thead>
<tr>
<th></th>
<th>FY1920</th>
<th>FY2021</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Revenue</td>
<td>$21.2M</td>
<td>$26M</td>
<td><strong>22%</strong></td>
</tr>
<tr>
<td>Donations</td>
<td>1,191,057</td>
<td>1,373,492</td>
<td><strong>15%</strong></td>
</tr>
<tr>
<td>Average Donation</td>
<td>$17.83</td>
<td>$18.90</td>
<td><strong>$1.07</strong></td>
</tr>
<tr>
<td>Open Rate</td>
<td>37.74%</td>
<td>38.43%</td>
<td><strong>+0.69 %</strong></td>
</tr>
<tr>
<td>Donations/Email</td>
<td>0.06</td>
<td>0.07</td>
<td><strong>17%</strong></td>
</tr>
<tr>
<td>Donations/Open</td>
<td>0.17</td>
<td>0.18</td>
<td><strong>6%</strong></td>
</tr>
<tr>
<td>$/email</td>
<td>$1.13</td>
<td>$1.31</td>
<td><strong>16%</strong></td>
</tr>
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</table>
Q2 English campaign
Annual Fund Banners

To all our readers in the U.S.,

Please don’t scroll past this. This Tuesday, for the 1st time recently, we humbly ask you to defend Wikipedia’s independence. 98% of our readers don’t give; they look the other way. If you donate just $2.75, or whatever you can, Wikipedia could keep thriving. Most people donate because Wikipedia is useful. If Wikipedia has given you $2.75 worth of knowledge, take a minute to donate. Show the editors who bring you neutral, verified information that their work matters. If you are one of our rare donors, you have our gratitude, and we warmly thank you. Your donation matters.

“… we hope you will consider supporting Wikipedia today. Our community of volunteer editors ensures that the information you read here is evidence-based and reliant on facts. Show them that their work matters.”
Total amount raised from recurring YoY

FY2021: fiscal year to date $9.9M (last year $6.4M)

Total amount raised from recurring FY1920: $12.6M
Fundraising Operations
Donor Services and Donation Processing

- Stayed on top of high volumes of donor inquiries throughout the quarter
  - 83,500 donor inquiries solved
  - Accomplished goal of no donor tickets beyond two weeks
  - Minimal backlog in January

- Focus on cross team collaboration
  - Comms - donor inquiries, social media responses
  - Online & MGFE - email QA, campaign strategy planning and coordination

- Collaborated with Major Gifts team to process 39,000 offline donations in Q2 -> $6.9M in offline revenue (initial reconciliation)
Fundraising Operations
Fundraising Analytics

- New reporting structure using Superset facilitated the creation of projections, and allowed us to closely monitor campaign performance live to inform campaign strategy.
- Collecting and closely monitoring behavioral insights and collaboration across teams resulted in optimized campaign performance as well as discovering and quickly resolving donor facing issues.

Reporting examples from Superset
Endowment

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

Gifts for Today (cash goal)
$5M goal for FY20-21
$100M goal by 2026

- Raised $17.5 million, YTD
- Endowment total value is now ~$90 million
- Refreshed Endowment website
- Endowment Board meets January 22 to discuss the future legal structure of the Endowment

Gifts for Tomorrow (legacy commitments)
135 goal for FY20-21

- Secured 697 commitments, YTD
  - 673 were made via FreeWill
  - 598 came from the US Thank You page
- This brings the total number of Wikipedia Legacy Society members to 1,087.
Major Gifts & Foundations

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

- Raised: $7.8M in Q2. Surpassed fiscal year goal of $10M.
  - Thank you Sasha and admin team!
- Continued virtual fundraising events
  - Hosted 3 online fundraising events, (2 large + 1 small) meeting FY goal of 5 online events.
  - Learnings & takeaways
  - Thank you to ITS, Comms, Katherine, Jack, Angie, Pau, Jorge, Felix, Zack, and Moriel.
- Prioritized gift processing, gratitude, and team resilience
Acronyms

**APP:** Annual Planning Process

**OKAPI:** Open Knowledge Application Programming Interface

**Recurring:** Monthly recurring donations