



Wikimedia Foundation 2015 -16 Annual Plan

TABLE OF CONTENTS

	Page
Lila's Foreword	3
Call to Action 2015	4
Improve Technology & Execution	
Focus on Knowledge & Community	
Support Innovation & New Knowledge	
The focus of the next year	5
Plan metrics	6
How we will measure success	
Summary of the fiscal plan	7
Board Resolution	8
Quarterly Breakdown of the Annual Plan	
Appendix A - Budget Detail	9-11
Total Revenue and Expenses	
Total Spending by Functional Area	
2014-15 Spending (projected) Compared with 2015-16 Plan	
Appendix B - WMF Structure	12
Staffing by Functional Area	
Appendix C - Team Priorities	13-14
Engineering	
Community Engagement	
Advancement	
Legal	
Communications	

About this document:

- *Amounts reflect management reporting, not generally accepted accounting principles (GAAP). GAAP amounts are noted where they appear.*
- *Management reporting reflects primarily cash-basis revenues and spending. As such it excludes non-cash items such as in-kind amounts and depreciation and includes total spending for capital items. Revenue projections and annual plan do not include ancillary revenue such as interest income, speaker fees, and miscellaneous income.*
- *Restricted amounts do not appear in this plan. As per the Gift Policy, restricted gifts above \$100K are approved on a case-by-case basis by the WMF Board.*

Lila's Foreword

In 2015, we declared what matters. We made changes to strengthen our movement and organization. We refocused on our core: community and technology, introducing new thinking and skills to the WMF, and new products to the world. We outlined this focus in our [Call to Action](#). We committed to organizational excellence, reconnected with our communities, and publicly reaffirmed our values.

- Organizational focus: organized around community, technology, and serving user needs.
- Results forward: built operations and [strategy](#) based on data and accountability for outcomes.
- Mobile-first: launched our first native apps for [iOS](#) and [Android](#).
- Collaboration: created a Partnerships Team to connect our vision to like-minded organizations.
- Values: [fought back against](#) government policies that would damage our mission.

We restructured the WMF around the people we serve, anchored in community and technology.

We unified community-facing teams. We began realignment with Wikimedia affiliates around shared priorities. We ran an open strategy consultation and invested in our election process, resulting in some of the highest volunteer engagement in the history of the project. We dedicated resources to promoting respectful, welcoming conduct on our sites, gender diversity, and the protection of minors. We reorganized technology talent around core audiences, elevating some of our most experienced people and bringing in new experts. We committed to user experience as a foundation for success. We shipped two [highly-rated mobile apps](#), dramatically improved editing performance, unified user identities across projects, and brought VE to deployment-ready quality.

Across the WMF we introduced best practices for action and progress. We overhauled reporting, introduced organization-wide [quarterly goals](#) and measurements, and set clear expectations for accountability. We established a special team mandated with driving performance across the organization.

We recommitted to our values. We took a stand against policies and practices like mass surveillance that harm our community and vision, establishing the Wikimedia Foundation as a major force on policy issues. We established a team to pursue partnerships with organizations that will expand our reach, and influence the technological, public policy, and cultural landscape.

We are not done. In 2016, we must declare for our future. Knowledge production, sharing, and the internet are changing all around us. In 2016 we must close gaps in core capabilities so we can expand the reach and depth of our projects across the world. These gaps remain in the areas of community (including affiliates and partners), technology, and communication.

We are a small non-profit in a land of internet giants, and as such we must be highly disciplined in what we do. We must partner heavily, leverage the strengths of our affiliates, increase volunteer engagement, and plan ahead. We must build funds and resources in order to invest in key far-reaching projects, and reimagine our movement for future generations. To succeed, we must embark on this shared future together. **Joined, we are stronger. Together we can empower every human to share in the sum of all knowledge.**

Call to Action 2015

Improve Technology & Execution

- We will define our commitments - and deliver on time and on budget.
- We will make our decisions based on data.
- We will improve our process for community input, and allocate dedicated technical resources to community requests.
- We will update legacy architectures and deliver mobile-ready infrastructure and services to support structured data, user security, and a simplified user experience.

Focus on Knowledge & Community

- We will integrate across community engagement functions to improve communication and results.
- We will create a central, multilingual hub for community support.
- We will have a working plan to support emerging users and communities.
- We will improve our measures of community health and content quality, and fund effective community and content initiatives.

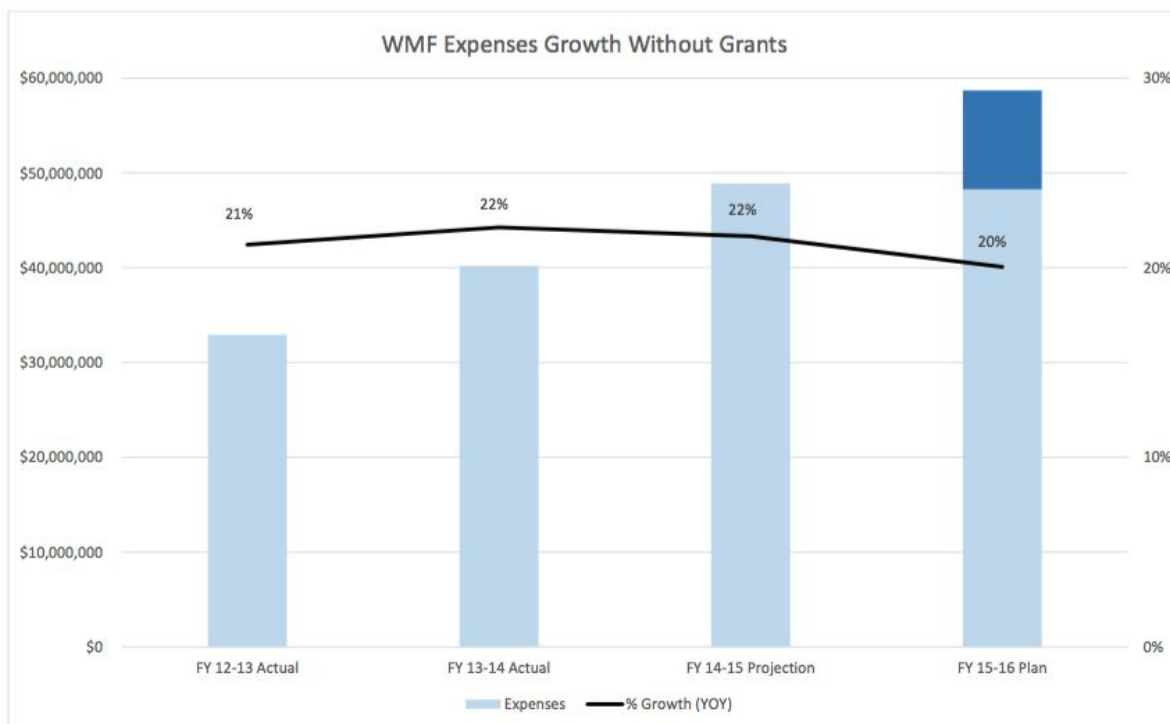
Support Innovation & New Knowledge

- We will integrate, consolidate, and pause or stop stalled initiatives.
- We will create spaces for future community-led innovations and new knowledge creation.
- We will facilitate and support new models and structures for knowledge curation.
- We will strengthen partnerships with organizations that use or contribute free content, or are aligned with the WMF in the free-knowledge movement.

The focus of the next year

Last year we set up teams and team structure¹ to align our organization with the future of the Wikimedia Foundation. This restructuring of Engineering and formation of the Community Engagement Department are, with the Call to Action, the basis for change in the FY 15-16 Fiscal Year.

1. **Consolidate staff and funding of current work:** We will reallocate staffing and funding from low-impact projects to projects that further improve our impact.
2. **Fill in the gaps in current user needs:**
 - a. **Software:** Examples include improving edit rates with Visual Editor, performance improvements, readership engagement improvements via improved readability and discovery UX, API build-out and refactor core technology so we can build faster in the future.
 - b. **Community support:** Examples include making the grant process simpler and responding to requests for fixes in an acceptable timeframe.
 - c. **Communication:** We are seeing communication gaps, inconsistency in messaging, and lack of centralized community and product communication. Filling the gap on product marketing, brand positioning, social engagement, and global support are all part of this effort.
3. **Currently unfunded/underfunded projects:** Experimentation with new initiatives (pending budget rebalancing and/or 6 month budget update as per WMF guidance).



FY 15-16 Plan: 58.7M vs. FY 14-15 Projection: 48.9M

Current Work: 48.26M (Consolidated)

Filling Gaps: 10.44M

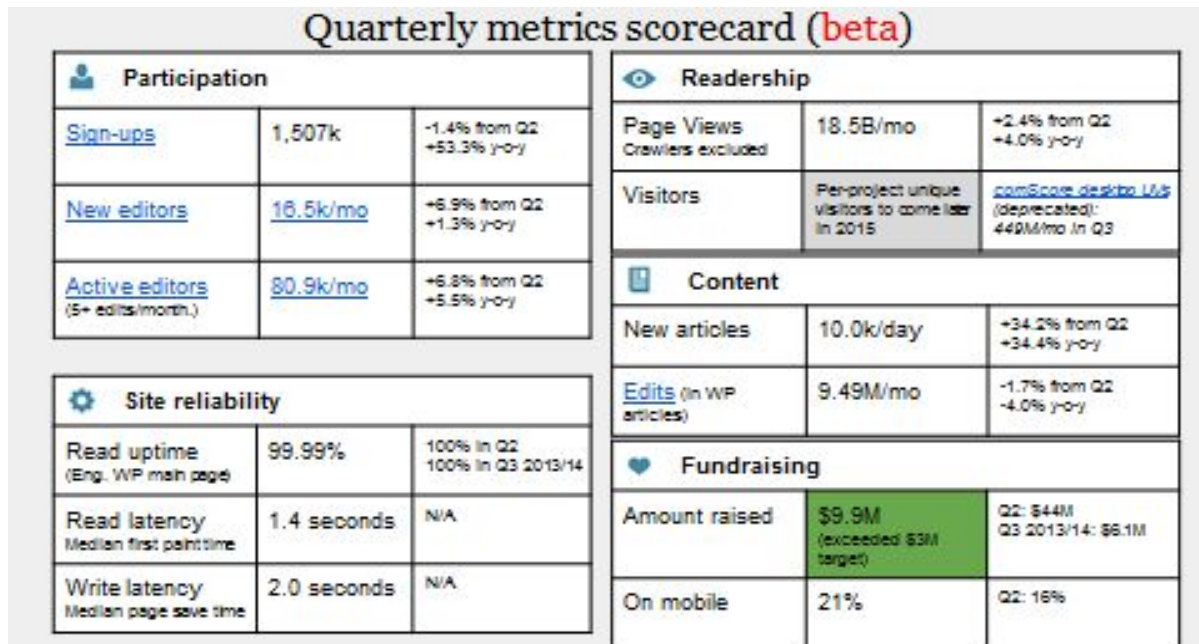
Figure 1

¹ See Appendix B for updated WMF leadership team structure.

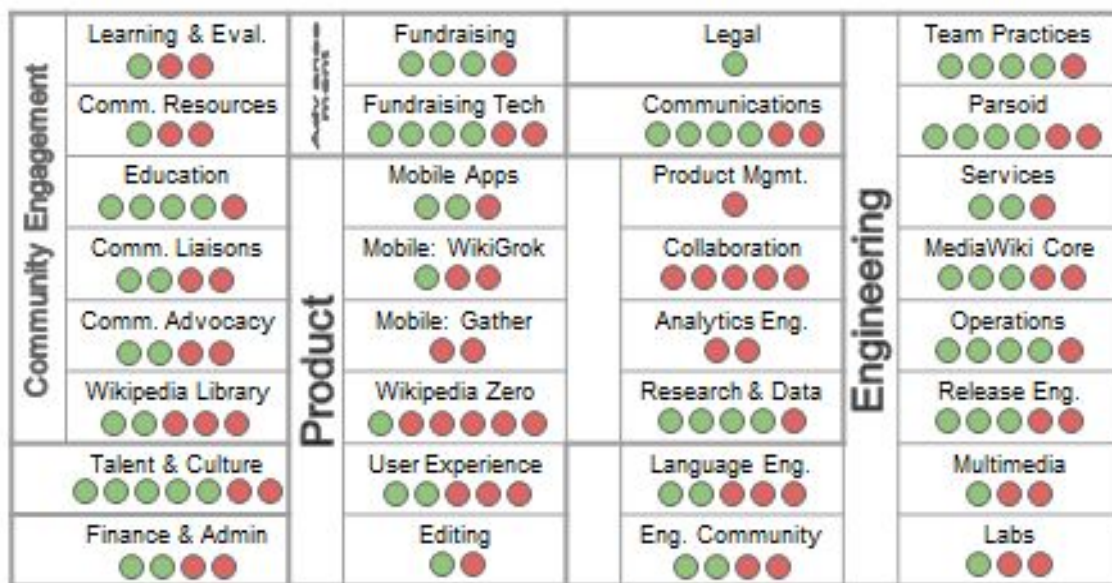
Plan metrics

How we will measure success

We will use a Quarterly Metrics Scorecard² to track our progress on delivering on our commitments in this plan. We will use both top-level and departmental metrics to measure our progress and report back to our community on that progress.



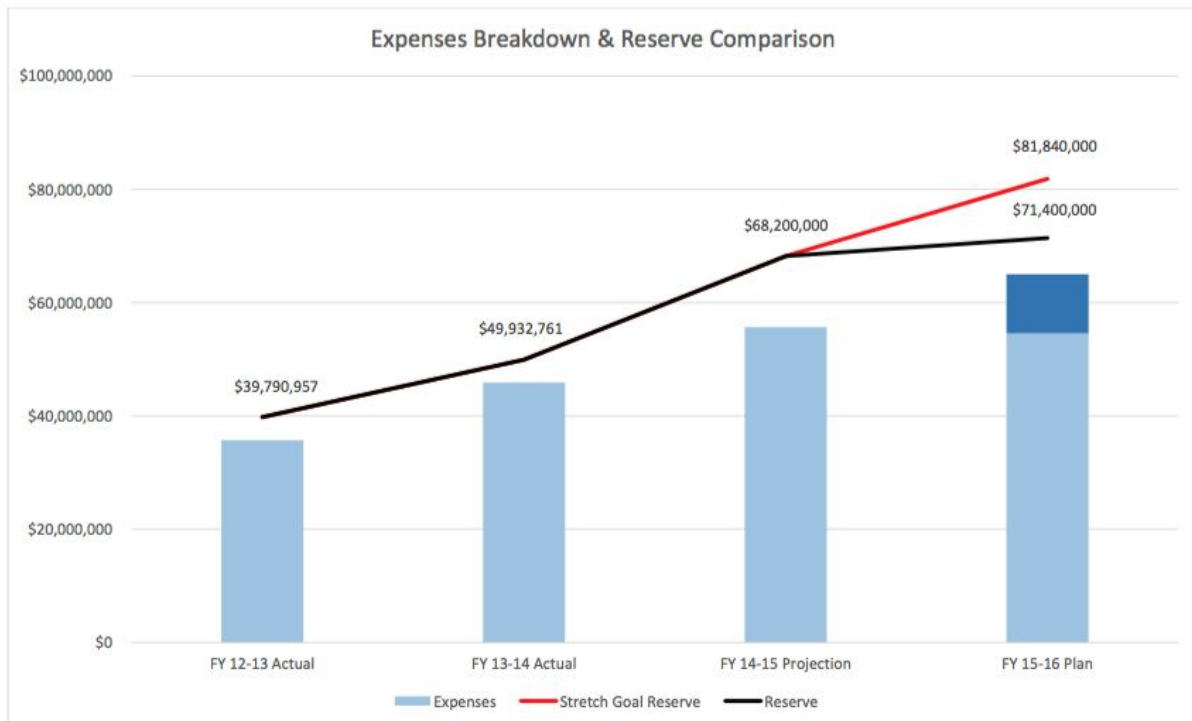
Q3 2014/15: Successes/misses by team



² For full report please see [Wikimedia Foundation Quarterly Report - January - March 2015](#)

Summary of the fiscal plan

- Twelve months of reserves as of June 30th.³
- 17% growth total budget.
- 20% growth without awards and grants.
- Begin our endowment with \$5 million.
- Reserve surplus overspending reduced by \$9.3 million.
- Stretch goal to exceed fundraising target by 20%.



FY 15-16 Plan: 65M vs. FY 14-15 Projection: 55.7M

Current Work: 54.56M (Consolidated)

Filling Gaps: 10.44M

Figure 2

³ The reserve target will be changed, upon Board review, to 12 months of reserves at the end of Q1 of the fiscal year.

Board Resolution

Resolved, that the Board of Trustees hereby approves management's proposed 2015-16 annual plan, which includes \$68.2 million of revenues, \$65 million of spending, and adds \$3.2 million to the reserve. This will be in addition to raising \$5 million for a new endowment. If, during the year, management anticipates the reserve at the end of any quarter will differ materially from the plan, the Board directs management to consult the Chair of the Audit Committee promptly.

Reference: https://wikimediafoundation.org/wiki/Resolution:Annual_Plan_2015-16

Quarterly Breakdown of the Annual Plan⁴

	Q1 (July - September)	Q2 (October - December)	Q3 (January - March)	Q4 (April - June)	Total
Cash Revenues	6.0	31.7	10.0	20.5	68.2
Cash Spending	14.7	15.5	18.0	16.8	65.0
Net	(8.7)	16.2	(8.0)	3.7	3.2
Reserve	59.5	75.7	67.7	71.4	71.4
Endowment					5.0

⁴ All amounts USD, in millions.

Appendix A - Budget Detail

Total Revenue and Expenses

2014-15 Projection vs 2015-16 Plan

	2014-15 Projection	2015-16 Plan	Increase (Decrease)	%
Revenue	74.0 (i)	68.2 ⁵	(5.8)	(8)
Expenses: WMF	48.9	58.7	9.8	20 (ii)
Expenses: Grants	6.8 (i)	6.3	(0.5) ⁶	(7)
Total Expenses	55.7	65.0	9.3	17
Contribution to reserve/endowment	18.3	8.2 (iii)	(10.1)	(55)
Reserve at end of year	68.2	71.4	3.2	5
Endowment at end of year	0	5.0	5.0	
Staffing at end of year	240	280	40	17 (iv)

(i) Amount does not include donation revenues retained by payment processing chapters as per the FDC grants of approximately \$1.4M.

(ii) The 20% increase is the net of \$454K in projected under-expenditures, increases due to annualizing of staff cost hired during the fiscal year, and additional staffing to implement the plan for the 15-16 fiscal year.

(iii) For FY 2015-16, WMF is budgeted to add \$3.2 million to the reserve and \$5 million to the "endowment".

(iv) Staffing growth trend for previous years: 35% (projected) in 2014-15, 23% in 2013-14, 22% in 2012-13, 53% in 2011-12, and 56% in 2010-11.

⁵ The \$68.2 million in revenue does not include the \$5 million to be raised for the Endowment.

⁶ The reduction in Grants is primarily due to the elimination of the Partnership Grant that was designated for Brazil in the amount of \$500,000, discontinued per feedback from the local community because desired outcomes were not achieved..

Total Spending by Functional Area

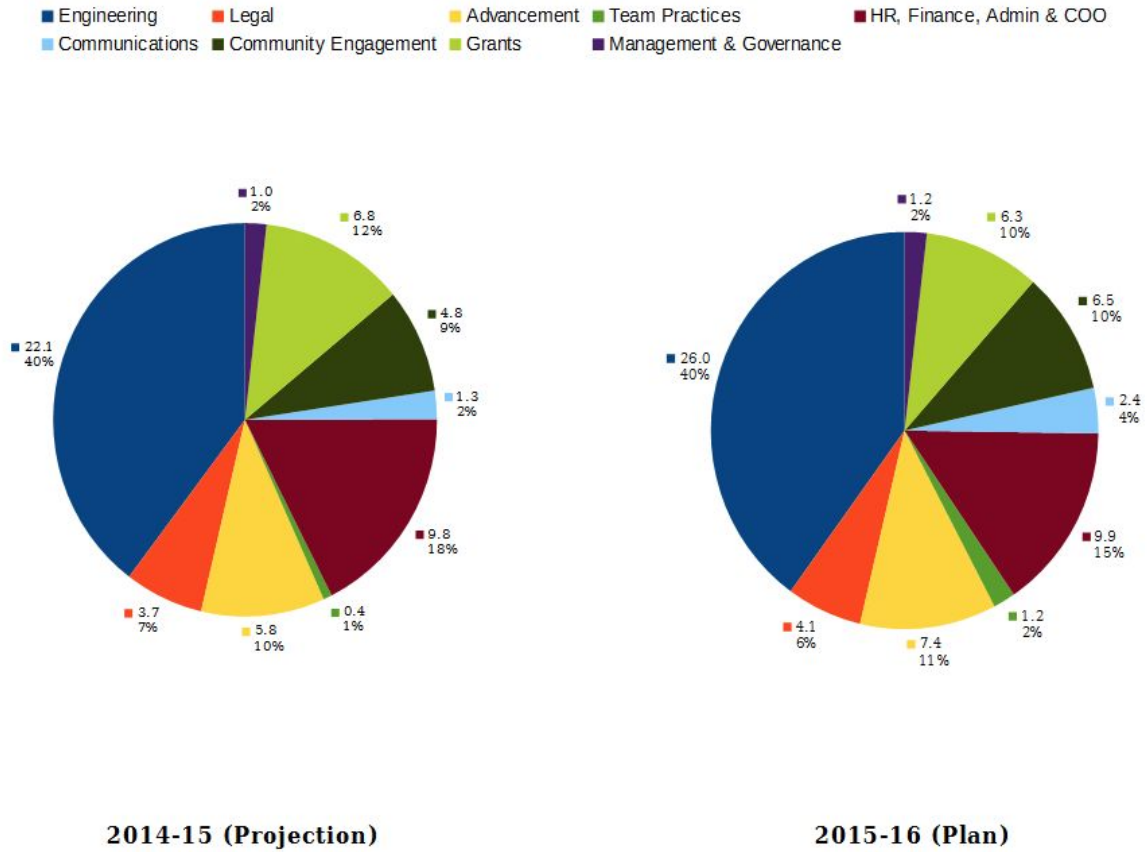


Figure 3
All amounts USD, in millions.

2014-15 Spending (projected) Compared with 2015-16 Plan

	FY 14-15	FY 15-16	Change in			% of Total
	Projection	Plan	\$	%		FY 15-16 Plan
Engineering	22,077	26,036	3,959	18%	a	40%
Management & Governance	1,048	1,201	153	15%		2%
Community Engagement	4,782	6,512	1,730	36%	b	10%
Advancement:						
Fundraising	4,860	5,605	745	15%	c	8%
Strategic Partnerships	976	1,412	436	45%	d	2%
Endowment	-	406	406		e	1%
Legal	3,702	4,055	353	10%	f	6%
HR/Finance/Admin/COO	9,776	9,913	137	1%		15%
Team Practices	365	1,142	777	213%	g	2%
Communications	1,291	2,418	1,127	87%	h	4%
Grants	6,800	6,300	(500)	-7%	i	10%
TOTAL	\$55,677	\$65,000	\$9,323	17%		100%

All amounts USD, in thousands.

2015-16 Plan vs. 2014-15 Projection

Summary: Projecting increases in spending due to continued investments in Engineering, Community Engagement, Advancement and Communications.

(a) Increase due to increase in staffing, annualization of staff hired during FY 14-15, increase in data center capital equipment, and increase in hosting expenses.

(b) Primarily due to increase in staffing.

(c) Increase due to increase in staffing and outside professional services that result from expanded scope in fundraising.

(d) New initiative, thus increase due to increase in staffing, professional services, and travel related expenses.

(e) New initiative, thus increase due to increase in staffing and professional services.

(f) Primarily due to increase in staffing.

(g) Primarily due to increase in staffing that was done outside of plan, and transfers of staff from other teams to respond to an increased demand for services and support.

(h) Increase due to increase in staffing from expanded scope of work.

(i) Primarily due to the elimination of the Partnership Grant that was designated for Brazil in the amount of \$500,000. The program was discontinued per feedback from the local community because desired outcomes were not achieved.

Appendix B - WMF Structure

Staffing by Functional Area

	2014-15 Projection <i>includes vacancies</i>	Current vacancies <i>included in projection</i>	2015-16 Plan	Increase (FTEs)	Increase (%)
Executive	2	0	2	0	0
Engineering	137	6	149	12(i)	9
Community Engagement	33	2	38	5(ii)	15
Advancement	17	0	23	6(iii)	35
Legal	9	0	12	3(iv)	33
HR/Finance/Admin/COO	31	6	38	7(v)	23
Team Practices	7	0	7	0	0
Communications	4	0	11	7(vi)	175
Total	240	14	280	40	17

(i) Engineering - 5 Engineers, 2 Engineering Managers, 1 Data Center Tech, 1 UX Designer, 1 Data Analyst, 1 Head of Infrastructure, 1 Chief Privacy Officer.

(ii) Community Engagement - 1 Community Organizer, 1 Survey Specialist, 1 Community Advocate, 1 Wikipedia Library Coordinator, 1 Community Liaison.

(iii) Advancement - 1 Endowment Director, 1 Partnership Manager, 1 Fundraising Email Manager, 1 Designer, 1 Fundraising Research Associate, 1 Development Outreach Manager.

(iv) Legal - 1 Attorney, 1 Legal Administrative Assistant, 1 Public Policy Specialist.

(v) HR/Finance/Administration/Office Information Technology - 2 Help Desk, 1 HR Analyst, 1 Recruiter, 1 Development Coach, 1 Financial/Budget Analyst, 1 Purchasing Specialist.

(vi) Communications - 2 Product Marketing Managers, 1 Communications Associate, 1 Advocacy Associate, 1 Social Media Manager, 1 Community Content Manager, 1 Internal Communications Manager.

Appendix C - Team Priorities

Engineering

Obtain and improve site usage metrics, including user research and test instrumentation, user testing, and A/B testing to drive product quality and direction. Begin API update. Continue performance work. Improve community engagement practices. Reduce the number of projects in favor of improved quality.

- Establish, monitor, and report KPI analytics to direct specific Wikipedia growth and product efforts
- Implement usability improvements to increase key quality metrics for Search and Discovery, Reading, Editing, and, Community
- Improve Wikipedia performance globally
- Create the Wikipedia API, begin MediaWiki modularization, and increase creation and reuse of structured data (Wikidata)
- Collaboratively define, document, and maintain product roadmaps.

Community Engagement

Focus on strengthening quantifying our understanding of contributors and the knowledge they produce, and prioritize programs and services based on this understanding. Define critical missing workflows for community support and staff as appropriate. In collaboration with community, re-align affiliate and WMF programs and simplify their funding. Clarify programs missions, goals, collateral, and training.

- Improve our ability to identify and support successful experimental projects: identify and review projects regularly, including those in IdeaLab
- Conduct online consultation to simplify grants program and improve alignment across affiliate organizations
- Provide structured program support, including goals, collateral, and training for more mature contributor-driven programs such as Education, GLAM, and the Wikipedia Library
- Set and monitor code review KPIs for all community-sourced contributions
- Identify community health metrics and test projects to improve them
- Set-up community communication pages for top subject areas, define workflows, and monitor KPIs.

Advancement

The Advancement Department will provide lasting financial support for existing and new initiatives, including those supporting the expansion of usage and contributions, and begin building relationships for new content delivery, distribution, and input.

- Raise \$68.2 million in the 2015-2016 fiscal year through online reader campaigns and fundraising outreach to foundations and major donors
- Raise \$5 million and secure planned gifts to ensure our long-term future through an endowment
- The Partnerships Team will pursue a range of strategic partnerships: secure or reconfirm two pre-install partnership for mobile, and build two large-scale content partnerships.

Legal

Steward the mission of the WMF by maintaining strong core support for a top ten website and global community as defined below, while providing needed capacity to change and innovate.

- Continue to meet internal SLAs for Foundation contracts, board support, and daily operating advice and workflows related to compliance in fundraising and grantmaking, technology liaison work, and other risk management
- Preserve the movement's reputation by maintaining global trademark filings in existing countries, strategically filing for protection in priority countries, and pursuing enforcement actions against infringers in a user-centered way
- Protect and help defend the interests of the WMF and our users through a variety of legal tools and strategies, including successful and relevant mediation, litigation, policy, and consultation, as appropriate
- Recommend and begin to implement privacy and public policy initiatives consistent with changing technology and our mission and values, including free expression and content liberation
- In coordination with our community, raise awareness of key issues to support our projects globally, including: free content, access to knowledge, and privacy
- Deliver constructive and effective training for staff given past growth.

Communications

Improve and grow the public image of our community, projects, and the WMF; steward the Wikipedia and Wikimedia brand positioning and management; advance public understanding of, and engagement with, free knowledge; and support and advance strategic initiatives and projects, with an emphasis on technology, innovation, and new knowledge. Continue positive international press coverage for community, advocacy, and product. Increase views and use of community and WMF content on WMF-managed communications channels. Grow social media audience.

- Secure coverage for and support definition of product roll-outs that fulfill their unique release criteria, defined on a per-project basis. Provide dedicated product-marketing support to drive integrated roll-outs for product launches, develop messaging platforms for new engineering teams, release strategic collateral including product-centric videos, and secure coverage globally.
- Refine and distribute community content and support community engagement through content, contributed by or featuring community members, and distributed across social, blog, video, press, and more
- Respond to and advocate around issues that impact our mission and our community, in collaboration with the Legal Department
- Improve information sharing within the Wikimedia Foundation, ensure regular and consistent internal communications around Foundation milestones, and help us move forward together toward common objectives using resources more effectively, improving the performance and alignment of the WMF.