



# Wikimedia Foundation

2015 -16 Annual Plan

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### *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 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.*

## Background and context

This is the draft version of the Wikimedia Foundation Annual Plan for the fiscal year (FY) 2015-2016. This document is being released for review and comments by the Wikimedia Foundation Board of Trustees and our community of volunteers. The comment period for this version of the Annual Plan will close May 29, 2015.

As compared to prior annual plans, this year's plan does not include a "Risks" section and it does not report out progress on our current annual plan. There will be a separate "Risks" document, which will be reviewed by the Board of Trustees by June 30, 2015. As appropriate, a public version may be released. The report on progress of our current annual plan is being covered in two parts: the release of our [Wikimedia Foundation Quarterly Reports](#) and in a year-end summary report which will be released by August 31, 2015.

The Wikimedia Foundation is a global nonprofit that provides systems and programs to grow free, uncensored knowledge for people all over the world in hundreds of languages, operating in the context of an international network of volunteer writers, editors, contributors, coders, and functionaries.

The approach taken in this annual plan is a significant shift from prior annual plans in the following major areas:

- This is a 12 month high-level overview of organizational priorities as guided by the 2015 Call to Action<sup>1</sup> and a forward-looking spend forecast.
- It will be reviewed bi-annually in June and January for updates to forward looking projections.
- It re-aligns organizational focus around communities and technical deliverables.
- It reserves a portion of the allocated budget to be released upon the meeting of set criteria and milestones.
- It assumes an emerging strategy process, which may affect specific budget allocations.
- It includes an initial version of organizational key performance indicators (KPIs) that will be used to monitor and measure effectiveness of the programs and services implemented by the Wikimedia Foundation and community organizations.

## Overview

This annual plan is designed to execute our operational focus on actively partnering with the Wikimedia volunteer communities and organizations to support the creation and dissemination of free knowledge to every human by implementing and coordinating central services, software and programs that are needed globally by volunteers and organizations to do their work.

### Structural changes to reporting

Engineering is now represented in one Engineering and Technology department. The Engineering side includes six teams: Community Technology, Editing, Reading, Search and Discovery, Infrastructure, Fundraising Technology. Technology, which will be led by a to-be-hired Chief Technology Officer, will include Architecture, Data Stores, Performance, Privacy, Research, Security, and User Experience.

A new Community Engagement department has been created, which brings together all community activities that were once distributed across Legal and Community Advocacy, Engineering, Finance and Grantmaking.

The Advancement department now includes development programs such as Wikipedia Zero and partner development alongside its pre-existing fundraising functions

The plan is focused on top-level objectives for each department, which does not include all projects.

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<sup>1</sup> See

[https://meta.wikimedia.org/wiki/Communications/State\\_of\\_the\\_Wikimedia\\_Foundation#2015\\_Call\\_to\\_Action](https://meta.wikimedia.org/wiki/Communications/State_of_the_Wikimedia_Foundation#2015_Call_to_Action)

## Summary of the Annual Plan

Our planned expenditures are \$67 million, or an increase of \$8.5 million over the current fiscal year budget (of which \$6.5 million is approved for spending and \$2 million is gated pending impact evaluation). This represents a 14.5% increase year over year (YOY). This increase includes \$4 million, or 6.35%, for cost of living, compensation adjustments and annualizing the compensation of staff hired during the 2014-2015 fiscal year. The remaining \$2.5 million represents increases in the areas of community support, engineering and communications and other expenditures to support the implementation of this annual plan. The gated \$2 million of this budget is being held for programs that may be funded based on our evaluation of proposed impact and our ability to deliver results in work that is currently under way. Travel and internal services budgets have been rebalanced towards headcount, where possible.<sup>2</sup>

## Key Performance Indicators (“KPIs”)

The Wikimedia Foundation will be monitoring progress on the annual plan using the Wikimedia Foundation quarterly metrics to track Participation, Readership, Site Reliability, Content, and Fundraising. In addition, the Wikimedia Foundation is tracking and reporting on quarterly goals for each team. Per our current practice, a [quarterly report](#) will be published to show the results for the metrics we are tracking and the status of the quarterly goals for each team. FY 2014-15 has been a transition year for the Wikimedia Foundation. Forecasting, budgeting and reporting are in the process of being updated and clarified. Given this transition, more specific KPI's for this annual plan will be included in the final version of the 2015-2016 Annual Plan that will be presented to the Wikimedia Foundation Board of Trustees for approval.

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<sup>2</sup> As the Wikimedia Foundation budget is a cash budget, in this annual plan we have discontinued our prior practice of including in our budget money for annual plan grants that are funded by the payment processing process. Only those annual plan grants that will need a cash expenditure from the Wikimedia Foundation are included in this budget. This will not change the six million dollar Annual Plan Grants budget; it will just align our budget with how Annual Plan Grants for payment-processing chapters are funded.

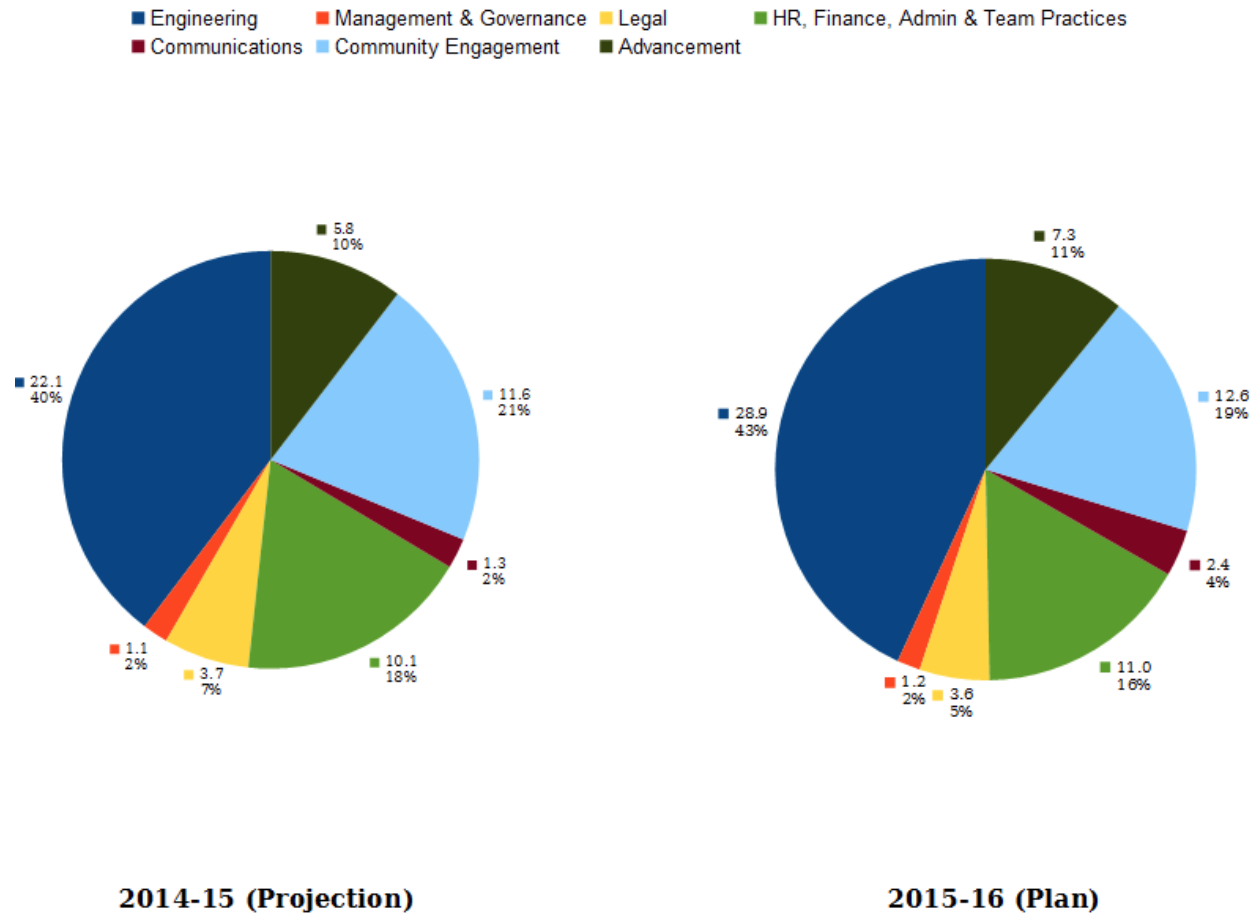
## Revenue and expenses

In the 2015-2016 fiscal year our plan is to increase revenue to \$67 million from a 2014-2015 budget of \$58.5 million, an increase of 14.5%. Additional funds (see Advancement) may be secured for the endowment.

	2014-15 Projection	2015-16 Plan	Increase (Decrease)	%	
<b>Revenue</b>	74.0 (i)	67.0	(7.0)	(9.5)	<i>(i) Amount does not include donation revenues retained by payment processing chapters as per the FDC grant of approximately \$1.4M.</i>
Expenses: WMF	48.9	58.9	10.0	20.4 (ii)	<i>(ii) The 19.8% increase is the net of \$454K in projected under expenditures, increases due annualizing of staff cost hired during the fiscal year and additional staffing to implement the plan for the 15-16 fiscal year.</i>
Expenses: Contingencies	0.0	2.0(iii)	2.0		<i>(iii) As described in the “Summary of the Annual Plan” section above.</i>
Expenses: Grants	6.8 (i)	6.1	(0.7)	(10.3)	<i>(i) Amount does not include donation revenues retained by payment processing chapters as per the FDC grant of approximately \$1.4M.</i>
<b>Total Expenses</b>	55.7	67.0	11.3	20.3	
<b>Contribution to reserve</b>	18.3	0.0 (iv)	(18.3)	(100)	<i>(iv) For FY 2015-16, WMF may add funding to the reserve dependent on fundraising and the funding needs of the annual plan.</i>
<b>Reserve at end of year</b>	68.2	68.2	0		
<b>Staffing at end of year</b>	240	283	43	17.9 (v)	<i>(v) 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.</i>

**Figure 1**

## Total spending by functional area



**Figure 2**  
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	28,939	6,862	31%	a	43%
Management & Governance	1,048	1,241	193	18%		2%
Community Engagement	11,582	12,612	1,030	9%	b	19%
Advancement	5,836	7,257	1,421	24%	c	11%
Legal	3,702	3,552	(150)	-4%		5%
HR/Finance/Admin/Team Practices	10,141	10,981	840	8%	d	16%
Communications	1,291	2,418	1,127	87%	e	4%
<b>TOTAL</b>	<b>\$55,677</b>	<b>\$67,000</b>	<b>\$11,323</b>	<b>20%</b>		<b>100%</b>

**Figure 3**

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) Increase primarily due to increase in staffing.

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

(d) Increase primarily due to increase in staffing that results from additional support requirements.

(e) Increase due to increase in staffing that results from expanded scope of work.

## Staffing

In 2015-16 the WMF plans to hire 43 staff members in addition to budgeted hires from the current fiscal year that were not hired by the end of our fiscal year. The hires are allocated across the organization with 11 positions in Engineering, 6 positions in Advancement, 9 positions in Community Engagement, 3 positions in Legal, 7 in Communications, 3 in Human Resources, and 4 in Finance, Administration, and Office Information Technology.

### 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	148	11(i)	8
Community Engagement	33	2	42	9(ii)	27
Advancement	17	0	23	6(iii)	35
Legal	9	0	12	3(iv)	33
HR/Finance/Admin/Team Practices	38	6	45	7(v)	18
Communications	4	0	11	7(vi)	175
<b>Total</b>	<b>240</b>	<b>14</b>	<b>283</b>	<b>43</b>	<b>18</b>

#### Figure 4

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

(ii) Community Engagement - 1 Community Tech Manager, 2 Community Tech Developers, 1 Designer, 1 Data Analyst, 1 Document Writer, 2 Wikipedia Library Coordinators, 1 GLAM Coordinator.

(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 Sourcer, 1 Development Coach, 1 Business 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.



## Annual Plan priorities:

### Engineering

Engineering will focus on updating core platform APIs, usage metrics, and performance to improve our ability to deliver front-end functionality. The team will also optimize user research and test instrumentation and community engagement practices to maximize success of features. The guidance from the Executive Director to Engineering is to reduce the number of projects in favor of improved quality.

- Establish, monitor, and report KPI analytics to direct specific Wikipedia growth and product efforts.
- Increase key quality metrics for Search and Discovery, Reading, Editing, and Community.
- Improve Wikipedia performance globally.
- Create and improve the Wikipedia API and increase creation and reuse of structured data (Wikidata).
- Document collaborative product process and workflows for community participation, reporting, and feedback.

### Community Engagement

Community Engagement will strengthen the Wikimedia Foundation's data-driven understanding of contributors and the knowledge they produce and prioritize programs and services based on this understanding.

- Identify critical communications and support channels, and relevant community health metrics, and test projects to improve those.
- Improve our ability to identify and support successful experimental projects and provide structured program support for more mature contributor-driven programs such as Education, GLAM, and the Wikipedia Library.
- Review and refine grant programs to ensure emphasis on impact, including content creation and contributor support.
- Identify and support critical community engagement workflows, including evaluation through metrics and key performance indicators.

### Legal

The Legal Department will continue to steward the mission of the WMF by maintaining strong core support for a top ten website and global community while providing needed capacity to change and innovate.

- Continue providing high performance levels and quick turnaround (meeting internal SLAs) for Foundation contracts, board support, and daily operating advice 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.
- Implement privacy and public policy initiatives consistent with changing technology and our mission and values, including free expression and content liberation.
- Deliver constructive and effective training for staff given past growth.

## Communications

The Communications department will define and shape the Wikimedia Foundation and its projects' public image and perception; 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, new knowledge.

- Launch Wikipedia 15, a global campaign for Wikipedia's 15th anniversary, including a kick-off event convening global thought leaders, community engagement and celebration, messaging platform for WMF strategy, executive speaking circuit, press coverage, a major report, and more.
- 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 including at least 3 top tier technology articles per major launch, in addition to international press.
- Refine and distribute community content, telling the story of Wikimedia. Support community engagement through content, including at least 20 stories monthly, contributed by or featuring community members, and distributed across social, blog, video, press, and more.
- Provide internal communications support to improve information sharing with the Wikimedia Foundation, ensure regular and consistent internal communications around Foundation milestones, and communicate specific campaigns consistent with the Wikimedia vision.

## Advancement

The Advancement department will provide lasting financial support for existing and new initiatives, including those supporting the expansion of usage and contributions.

- Raise \$67 million for WMF to support our work in the 2015-2016 fiscal year through online reader campaigns and fundraising to foundations and major donors.
- Begin work to raise \$5 million and to secure planned gifts in order to ensure our long-term future through an endowment.
- The Partnerships team will pursue a range of strategic partnerships, focusing on those that help maintain and grow reader engagement and content on our sites and through our app.

## Board resolution

RESOLVED, that the Board of Trustees hereby approves management's proposed 2015-16 annual plan, which includes \$67 million of revenues, \$67 million of spending, with no budgeted increase to financial reserves. If, during the year, management anticipates the reserve at each quarter-end will differ materially from the plan, the Board directs management to consult the Chair of the Audit Committee promptly. Reference: Management's currently anticipated "Quarterly Breakdown of the Approved Annual Plan."

### Quarterly Breakdown of the Annual Plan

	<b>Q1</b> (July - September)	<b>Q2</b> (October - December)	<b>Q3</b> (January - March)	<b>Q4</b> (April - June)	<b>Total</b>
Cash Revenues	6.0	31.5	9.5	20.0	<b>67.0</b>
Cash Spending	15.0	14.9	19.3	17.8	<b>67.0</b>
Net	(9.0)	16.6	(9.8)	2.2	<b>0.0</b>
Reserve	59.2	75.8	66.0	68.2	<b>68.2</b>

**Figure 5**  
All amounts USD, in millions.

## **Appendix: new engineering organization structure**

### **Engineering**

Working with mobile as the framework for the work in the Engineering Department, we have the following focus areas:

#### **Editing**

The Editing team's mission is to build collaborative, inclusive tools for creating, editing, and curating freely licensed content. Their audiences are the people who edit Wikimedia projects, contribute to structured data and multimedia, and participate in editing-related discussions. This includes the current work on VisualEditor, but will also include mobile editing, improved structured discussion and notifications, multimedia tools, dashboards, content IDs, and structured references. Most of the people who are already working on VisualEditor will join this new team, as well as members of the Collaboration, Design, Language, Parsing, and Platform teams.

The Editing team will improve the editing experience, including on mobile (increase number of positive mobile modifications and other key metrics) by reducing the complexity of editing and increasing quality edit rates for structured content, which will include a wider implementation of VisualEditor.

#### **Search and Discovery**

The Search and Discovery team is focused on improving the way people discover knowledge and navigate Wikimedia. Their audience is broad, from new users discovering Wikipedia for the first time to the content creators and editors who build the knowledge. Their immediate task will be to build on our existing secure, trusted search stack to improve result relevancy, expose additional related content, and improve access to locally-relevant knowledge, with a special emphasis on efficient navigation, structured data integration, and multilingual support. This team will pull together people with experience working on our current search, and will grow to focus on relevancy, exploration of tools, machine learning, and performance.

The Search and Discovery team will measure and improve the relevance of search results on Wikipedia content and standardize user experience across platforms. The team will create a Wikidata Query API and incrementally improve and change as requirements are revealed.

#### **Reading**

The Reading team's mission is to build exceptional learning and reading experiences for the sum of all knowledge, from desktop and mobile web to apps and APIs. The immediate work will focus on understanding user needs and how readers interact with Wikimedia content, as well as finding ways to improve and accelerate experiences. The team will build beautiful, functional, and fast user interfaces for all locations, devices, and language. This effort will pull together teams currently working on mobile apps, mobile web, desktop UX, and MediaWiki.

The Reading team will improve the Wikipedia reading experience on mobile, both on the native app and mobile web.

#### **Infrastructure**

The Infrastructure team ensures a high level of service to support our users, technical platform, and developer tools. The team's audience is our internal audience teams (Reading, Search and Discovery, and Editing). The Infrastructure team will focus on providing the best possible uptime, ease of use, performance, scalability, reliability to users, technical teams and community teams. Their work is crosscutting, and

supports the broader Engineering and Technology organizations. The new Infrastructure team pulls together the Analytics, Operations, Release Engineering, Services, Data Center Operations, and Labs functions.

The Infrastructure team will improve overall Wikipedia uptime and availability, and improve the stability of our Labs infrastructure to increase community use and satisfaction of our Labs environment. This year, the Infrastructure Services team will deliver a stable and performant API foundation for all Wikimedia projects to use.

### **Fundraising Technology**

The Fundraising Technology team will continue with its same focus. Their audience is donors, who they support through stability, security, and engineering superior usability.

The Fundraising Technology team will optimize and implement mobile conversion and keep up-to-date with payment processors. The team will reduce technical debt, and create a native mobile donation system based on a series of experiments to gather data on native app donation performance.

### **Community Technology**

The Community Technology team is focused on meeting the needs of active Wikimedia editors for improved, expert-focused curation and moderation tools. The creation of the Community Technology team is a direct outcome of requests from core contributors for improved support for moderation tools, bots, and other features that help the Wikimedia projects succeed. The team will work closely with the community, through the Community Engagement Department, to define their roadmap and deliverables.

The Community Technology team will implement a rapid process for responding to technical issues raised by the community, and monitor and support tool and app development.

### **Research**

The Research team conducts qualitative and quantitative research to produce knowledge about Wikimedia's users and projects. Their audience includes the internal audience teams (Reading, Search and Discovery, and Editing), members of the Wikimedia community, and external academic and research partners. Their goal is to provide strategic insights and technological solutions to the Wikimedia Foundation and Wikimedia movement to inform the development of new products and foster innovation. The Research team will bring together the User Research team and the Research and Data team (formerly part of Analytics).

The Research team will build analytics and performance systems to provide key performance metrics that will enable engineers to effectively target and fix performance and user funnel problems.

### **Architecture**

The Architecture function is responsible for resolving difficult platform challenges, making high-level platform design choices, and recommending technical standards. This team makes sure that our technology is ready for use by product teams to advance the WMF mission.

### **Performance**

The Performance team is all about making the site as fast and functional as possible through initiatives like our recent deployment of HHVM. The Performance team will be recruiting additional engineers to support work already underway.

## **Privacy**

Privacy is one of the Wikimedia Foundation's core values, and the Foundation protects and defends the privacy of Wikimedia users. WMF will be bringing expertise on to lead the ongoing work to engineer privacy into our platform, through encryption, data protection, and secure identity management.

## **User Experience**

User experience (UX) is the practice of putting users first. The UX function will be responsible for improving and optimizing people's ability to interact with the Wikimedia projects. This team will make sure user experience is consistent, delightful, and reflects the Wikimedia brand and values.