

Advancement Q4 FY20-21



WIKIMEDIA
FOUNDATION

Advancement

	Q1	Q2	Q3	Q4
Partnerships	↗	↗	↗	✓
(Okapi) Enterprise	→	→	→	→
Revenue	↗	↗	✓	✓

OKR slides



WIKIMEDIA
FOUNDATION

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.

Thriving Movement: Community Programs (T-O12-D1)

- **Global:** This quarter we ran Cycle 3 of #WikiForHumanRights in collaboration with our United Nations (UN) partners OHCHR, UNEP, and UNICEF. The theme for this cycle was the “Right to a Healthy Environment.” The editathon expanded to 24 local events and 35 languages. More than 300 people created >800 articles.

Worldwide Readership: Growing Readership (W-O6-D3), Elevate WMF Brand (B-O4-D22)

- **Global:** We are partnering with Microsoft to bring a Progressive Web App (PWA) to the the new Windows10 store. As part of the agreement, Microsoft is providing **in-kind marketing and exposure support across 16 markets** selected by WMF. We estimate the PWA and associated promotions could **reach >185 Million users worldwide**. We will measure impact by tracking new installs in the 16 markets compared to new installs in non-promoted markets to understand if this is a strategy worth replicating with other phone manufacturers.
- **SouthEast Asia & Africa:** After working with Inuka for more than a year on the product, we integrated [Wikipedia Preview](#) with three partners this quarter: Good News from Indonesia, Malaysian EdTech company BeEd, and African EdTech company Right for Education (R:Ed). Wikipedia content will reach **more than half a million readers across these three markets**. For more information, see the Diff post [here](#).

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 3 new partnership models in support of the 5 MTP priority areas in order to provide recommendations to the foundation for partnership implementation at scale Baseline: 0 models tested	3	1	2	2	3
Deliver best-in-class partnerships support to WMF departments, as measured by a Net Promoter Score >70 Baseline: 0 NPS score	>70	Measured Semi-Annually (Q2 and Q4)	91	Measured Semi-Annually (Q2 and Q4)	91
Test a minimum of 3 new partnership models in support of the 5 MTP priority areas in order to provide recommendations to the foundation for partnership implementation at scale Baseline: 0 models tested	3	1	2	2	3



Department:
Advancement

Drill Down: Partnerships (1/2)



Experimenting with Native Apps for Phone Manufacturers in Emerging Markets

To complement the Partnership's team in-service model, where we support other teams and departments to achieve their annual OKRs, we also **proactively look for opportunities outside of WMF's traditional way of working, to test as potential scalable ways to support WMF's mission.**

Because our team is one of the most external-facing teams at the organization, and are based globally with deep expertise in emerging market, we are particularly well-positioned to take on this "sensing and innovating" role.

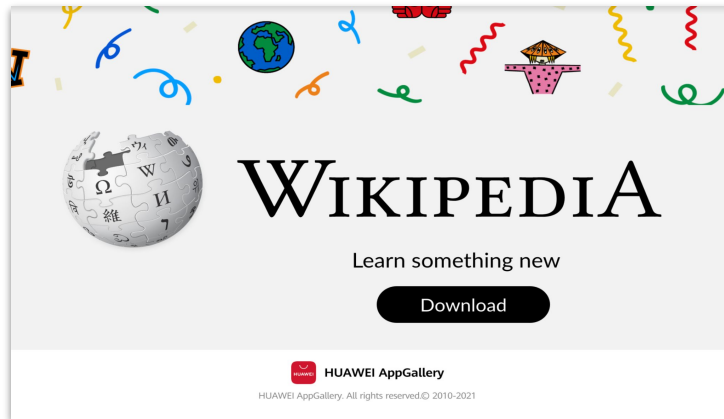


This year, we sought out three phone manufacturers with a large and growing user base in EMs: Huawei (760 million), Jio (388 million), and Microsoft (800 million). We built the business case for the Product department to invest in development of the apps, worked with the Brand Studio to design marketing assets, and negotiated partnership agreements with the orgs.

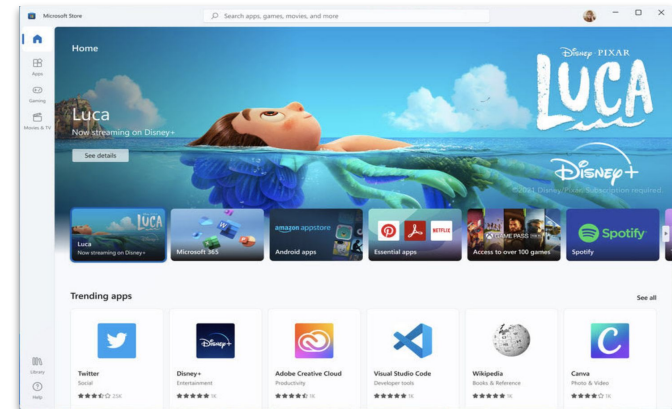
- **Data to-date:** Huawei: **2.3M downloads** in first week (before marketing push has begun); Jio: **3M downloads** in first quarter (no marketing), Microsoft; launching August 15. **We expect these numbers to grow exponentially as our marketing pushes for Huawei and Microsoft begin in Q1**, and will keep the C-Team apprised of the new numbers.
- We are working with the Comms department to understand how we can responsibly begin **marketing our relationship with Jio in India.**

Drill Down: Partnerships (2/2)

Experimenting with Native Apps for Phone Manufacturers in Emerging Markets



Example of full-page splash screen that will appear in the Huawei AppGallery in 6 markets.* Huawei will also promote the app on social media at no cost.



Example of premium placement of app in “out of the box experience” on Windows10 devices in 16 markets**. MSFT highlighted Wikipedia as one of four launch partners in its global launch announcement.

Enterprise



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.

- **Product is feature complete and at parity with the Foundation's free API offerings.** The Enterprise platform now supports a robust suite of APIs that provides a solid foundation for future development.
- **Team has grown from two to seven people,** significantly increasing the capacity of the team. We have added two software engineers, a product marketer, an operations manager, and a strategic communications manager.
- **Community engagement remains high and largely positive,** via monthly office hours and community virtual events. The team is actively addressing the documentation of business practices requested by community members in advance of commercial product launch.
- **Product access now available via Cloud Services.** This will allow free community access to the 'daily dumps+hourly diffs' service. Fulfilling a key use-case without sacrificing commercial value.



Enterprise



Key Results

	Year Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
<p>Q1: Develop and validate an initial business strategy</p> <p>Q2: Develop a customer pipeline with a minimum of 5 soft commitments to a specific product and price point</p> <p>Q3: Develop a model for the distribution of revenue across the Foundation, the endowment, and the community</p> <p>Q4: Close at least 2 paying customers</p> <p>Baseline: 0% complete</p>	100%	15%	30%	65%	75%
<p>Q1: Deliver a commercially functional alpha product</p> <p>Q2: Support at least one partner organization in using a beta offering in order to validate product value</p> <p>Q4: Ensure launch product is robust enough to support at least 2 paying customers</p> <p>Baseline: 0% complete</p>	100%	20%	30%	65%	100%
<p>Q1: Develop a community engagement roadmap</p> <p>Q2: Complete legal review of business & revenue strategy, approved by KPMG</p> <p>Q3: Complete community engagement roadmap</p> <p>Q4: Ensure modifications based on community feedback are in place</p> <p>Q4: Draft terms of service and agreement templates for service engagements</p> <p>Baseline: 0% complete</p>	100%	25%	50%	85%	100%

Drill Down: Enterprise Q4 KR



The situation

Although we made significant progress towards our goal of closing our first two paying customers for the Wikimedia Enterprise product before the end of the fiscal year, and are in active sales negotiations with multiple potential customers, we were not able to complete our first two sales before the end of Q4.

The impact

We are developing a clearer picture of the length of the sales cycle for the Wikimedia Enterprise product, as well as what features and functionalities customers find desirable, are willing to pay for, and for which they are willing to shift investment from their in-house solution.

Recommendation

We are incorporating what we have learned about the timeline for sales of the Wikimedia Enterprise product into our future forecasts in order to make more accurate revenue predictions in coming years. We have also incorporated customer feedback about desirable product features into our roadmap for the upcoming fiscal year.

Revenue



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 the revised annual target of \$125M (revised from \$108M)
 - Exceeded the initial Endowment target of \$100M
 - Ran campaigns in Sweden and LATAM.
 - Held 3 virtual events for high capacity potential donors
-

Target quarter for completion: Q4 FY20-21



Department: Advancement

Revenue



Key Results	Year Goal	Q1 Status	Q2 Status	Q3 Status	Q4 Status
Raise \$125 million for the Foundation (revised goal from \$108M) Baseline: \$0	\$125 million	\$42 million	\$124 million	\$142 million	\$154 million
Raise \$105M FY - revised goal from \$88M Baseline: \$0	\$105 million	\$37.2 million	\$101.4million	\$115 million	\$125 million
Raise \$10 million in 2020-21 FY Baseline: \$0	\$10 million	\$3.8 million	\$12.2 million	\$16 million	\$18 million
Raise \$5 million for the Endowment in 2020-21 FY Baseline: \$0	\$5 million	\$1.2 million	\$17.5 million	\$18.6 million	\$18.9 million
Raise \$10 million from chapters in 2020-21 FY Baseline: \$0	\$10 million	\$950K	\$10.8 million	\$10.8 million	\$12 million
5+ online major donor events by end of FY Baseline: 0 online events	5 events	2 events held	5 events held	6 events held	10 events held
135 planned giving commitments Baseline: 0 planned giving commitments	135	58	697	813	1,094

Department slides



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Welcome to the team

Chen Almog



Senior Program Officer
(Conference and Events Grants)

Community Resources
Tel Aviv, Israel

Jessica Stephenson



Lead Community Learning and
Evaluation Program Officer

Community Resources
Prague, Czech Republic

Jayde Antonio



Senior Program
Manager

Alexandria, VA,
United States

Jessica James-Hill



Senior Endowment Gifts Officer

Endowment
Charlotte, NC, USA



Welcome to the team

Lindsay Wadleigh



Donor Relations Specialist

Fundraising Operations
San Diego, Ca

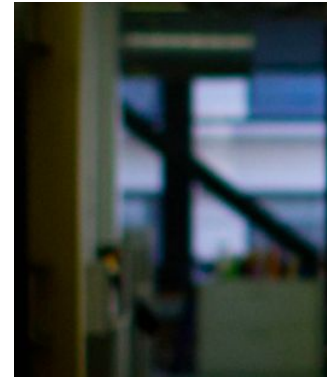
Jayme Simmons



Development Associate

Major Gifts & Endowment
Columbia, MO, USA

Damilare Adedoyin



Software Engineer

Fundraising Tech



Online Fundraising

Raised \$9.5M, exceeding quarterly goal and fiscal year goal. Grand total= \$125M

- Accommodated changes to our campaigns based on community/country feedback
 - Condensed Mexico banner campaign to accommodate WikiLoves Mexico campaign
 - India campaign was cancelled due to the COVID-19 situation
 - Colombia campaign was cancelled due to political unrest in the country
 - Integrated Brazil community feedback prior to and during live campaign
- Ran fundraising campaigns in Sweden and LATAM Bundle (Argentina, Mexico, Brazil, Chile, Uruguay and Peru)
- In partnership with the Product team, prepared for a project in the “Newcomer Experience Pilot”, to send email invitations to become editors to donors who have expressed interest in editing.

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 initial goal by 2026

- Raised \$18.9 million in FY20-21 from 1.25 million donations
 - 87.5% came from individual gifts <\$1,000
 - 3% came from realized planned gifts (8 gifts totalling \$578,000)
- Endowment total value was \$102.5 million at close of Q4

Gifts for Tomorrow (legacy commitments)

135 goal for FY20-21

- Secured 1,094 legacy commitments in FY20-21
 - 251 resulted from our Q4 Planned Giving Email Campaign
 - 91% of all legacy commitments this year were made via [FreeWill](#)
- Added legacy giving information to the Great Britain and English-speaking Canada Thank You pages
- This brings the total number of Wikipedia Legacy Society members to 1,457.



Wikimedia Endowment - where we are today:

\$102.5 million

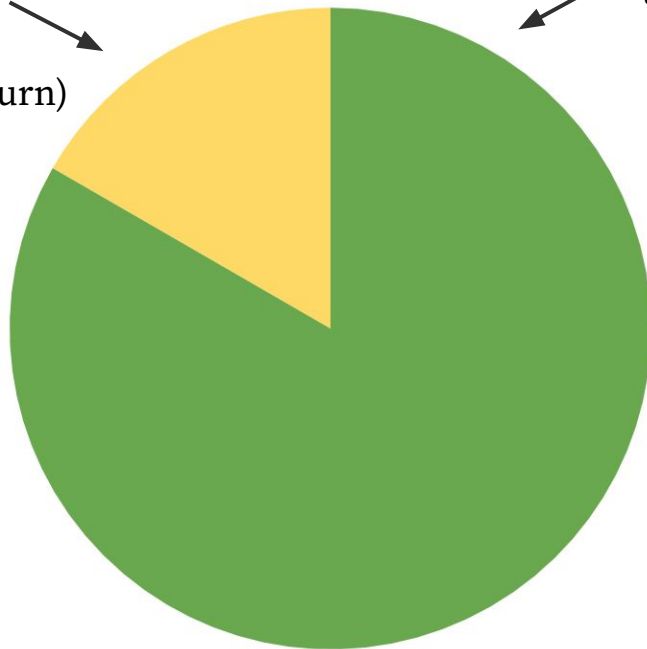
Investment Returns

\$16.5 million

(10.22% rate of return)

Donations

\$86 million



Endowment

Transitioning the Endowment to a new 501c3

Completed in Q4

- Worked with internal and outside counsel on drafts of the Articles of Incorporation, Bylaws, and other governance documents for the new 501c3.
- Began conversations with new candidates for the Endowment Board.
- Onboarded a Senior Program Manager to assist with support of the new 501c3 and its Board.



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: \$3M in Q4. Surpassed fiscal year goal of \$10M.**
 - Thank you Sasha and admin team!
- **Interviewed, hired and began onboarding for new team member**
- **Held 3 virtual cultivation events for HNWI and high-capacity potential donors**
 - Goals: Stewardship & engagement. Cultivation towards a large ask for lapsed, potential donors and upgrade prospects.
 - Creating redundancies in back-of-house event support capabilities
 - Impact will be measured by tracking these donors' donation behavior in Q1 & Q2.
- **Planning and prep work for 20th Birthday major gift solicitations**



Fundraising Operations

- Supported fundraising campaigns in Sweden and Latin America
- Kicked off donor and reader survey project in our main English speaking fundraising markets
- Supported the fundraising teams' email segmentation strategy for FY21/22
- Built out new Zendesk reporting processes and campaign metrics

Hiring:

- Kicked off hiring process for 2 Donor Relations Specialists (start date Aug 16th)
- Hired Senior Analytics contractor (start date July 19th)



Fundraising Tech

- Email preference center prototype setup for donors to opt-in to different types of communication from Wikimedia
- Iterated on CiviCRM donor database search kit with the core team
 - Also lead trainings on search kit. Lots of great new reports coming out!
- Started on Adyen and apple pay payment processor integrations
 - Currently it's very close to release for credit cards
 - Apple pay development is continuing

Hiring:

- Hired a new engineer Damilare!



Appendix



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Questions

Partnerships: Yael Weissburg

Enterprise: Lane Becker

Revenue: Megan Hernandez

Online Fundraising: Pats Pena

Endowment: Amy Parker

Major Gifts & Foundations: Caitlin Virtue

Fundraising Operations: Jessica Robell



Acronyms

HNWI: High net worth individual

PWA: Progressive Web App

