

# Finance & Administration

October 2018 check-in



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# Cross-team Outcomes



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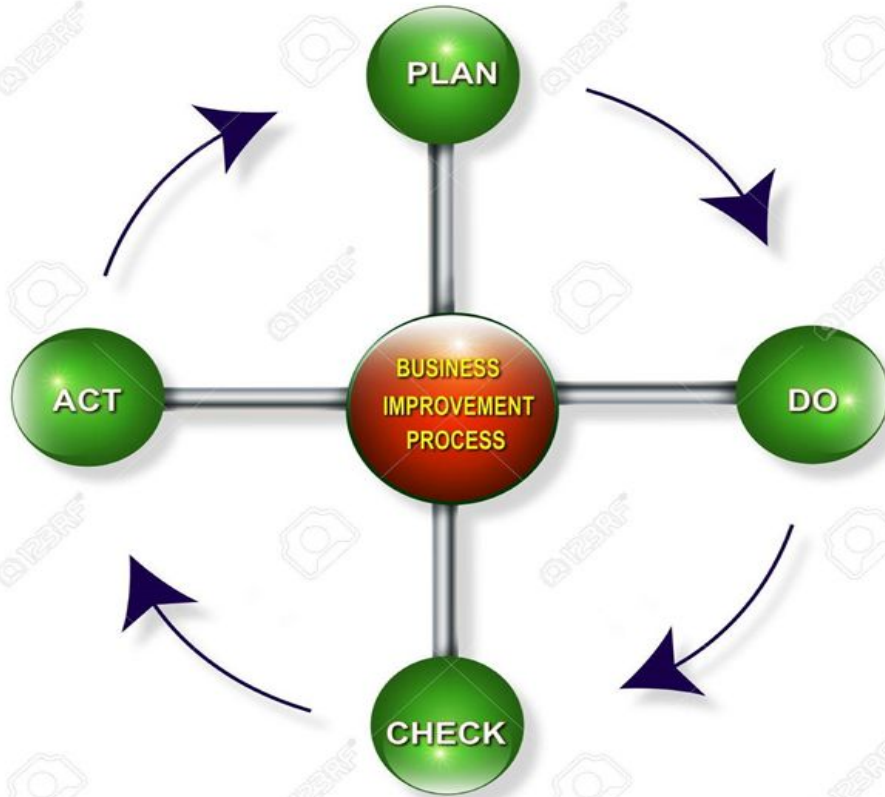
# Business Operations Improvement

(Processes to enable staff to deliver on their  
organizational goals)



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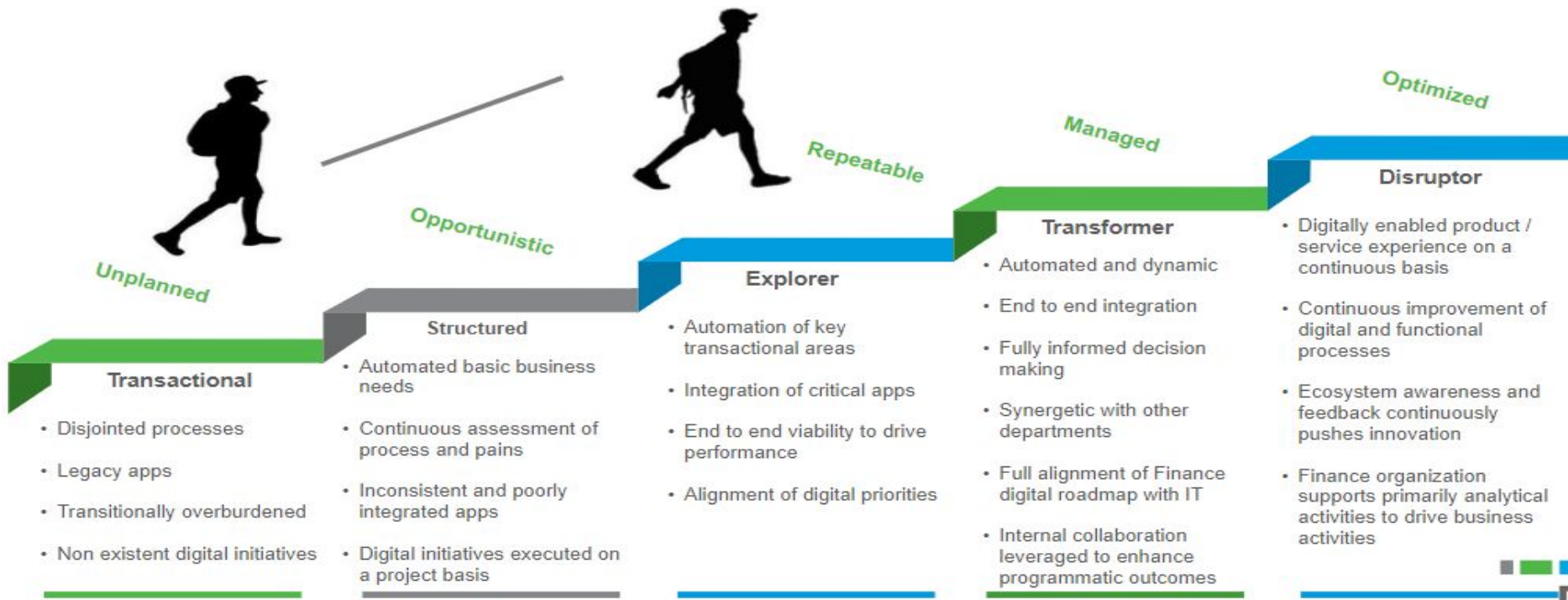
# Continuous Cycle of Business Improvement



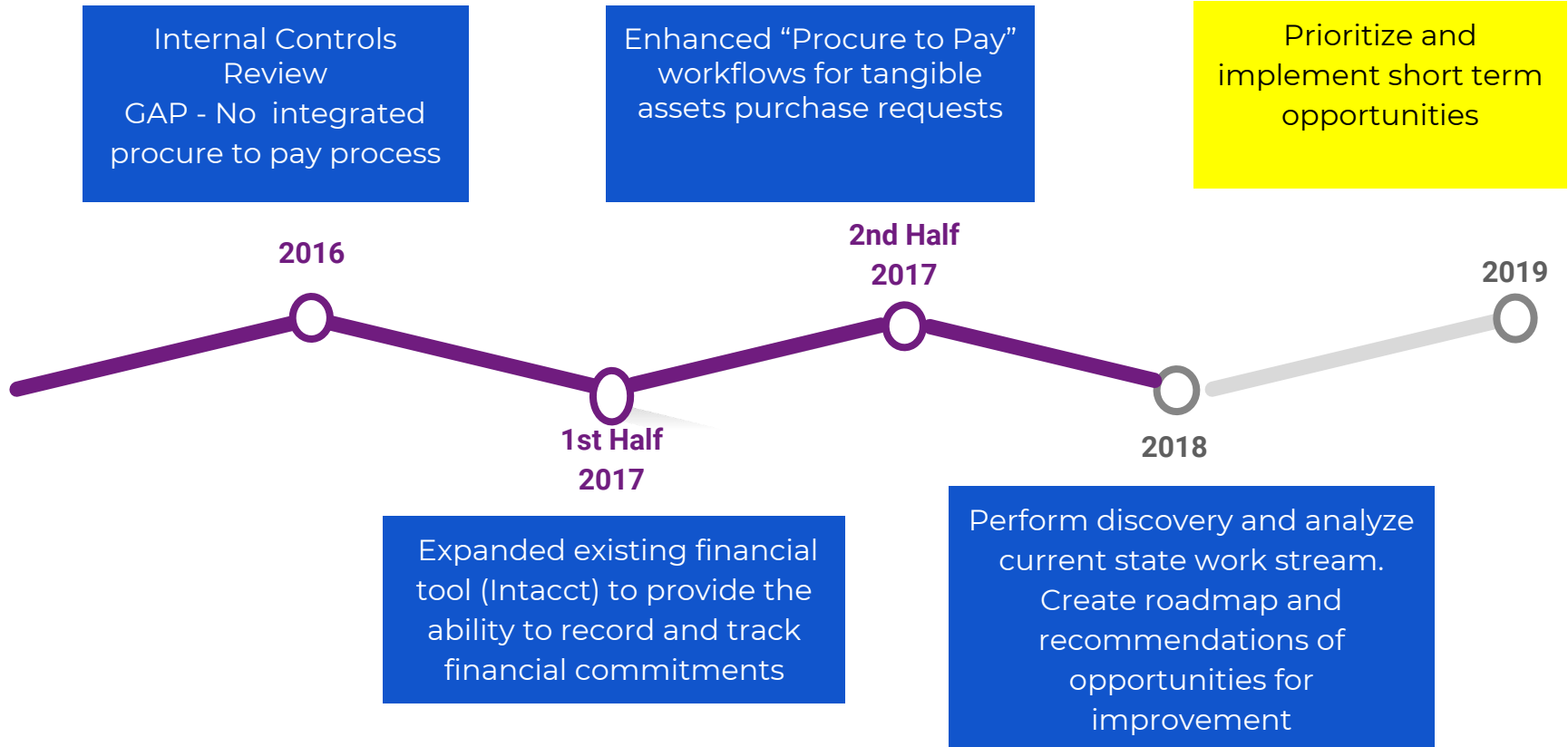
- **Relevant**
- **Iterative and continuous**
- **Based on organizational growth, needs and strategic direction with focus on a scalable and sustainable solution.**

# Building A Sustainable and Productive Process

Organizations with more mature, high performing processes are more likely to be thriving.



# Our progress



# Progress Highlights

1. Discovery and assessment of current processes completed
2. Recommendation roadmap and project plan approved
3. Finalized Employee Expense Reimbursement Form in Google
4. Instituted blanket Purchase Order for small recurring and expected tangible goods spending
5. Identified control risks criteria for assessment and process redesign
6. Implemented group travel management tool
7. Drafted business requirements for software solution sourcing



# When can we expect changes - project timeline

- Contract Services - 7-8 months
  - **Pilot redesigned process - Oct-Nov '18**
  - **Roll out/Training redesigned process - Nov-Dec '18**
  - Pilot new software solution - Feb-Mar '19
  - Roll out/Training new software solution - Mar - Apr '19
- Travel - 3-4 months
  - **Pilot workflow using enhanced software solution - Oct-Dec '18**
  - Roll out/Training - Dec'18-Jan'19
- Expense Report - 6-7 months
  - **Roll out/Training new expense report template - Oct '18**
  - Pilot new software - Jan '19
  - Roll out/Training new software solution - Feb '19



# Enterprise Risk Management

**Wikimedia Foundation seeks to enhance its risk management capabilities by completing a structured Enterprise Risk Assessment (ERA)**



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# GOAL: to enhance our risk management capabilities by completing a structured Enterprise Risk Assessment (ERA)

What are your outcomes?	What impact / deliverables are you expecting?
	LAST QUARTER
<p><b>Outcome 1:</b> Reaching consensus on the critical risks to Wikimedia's strategic objectives</p> <p><b>Outcome 2:</b> Establishing and leveraging a defined risk assessment process.</p>	<p>Partnered with Legal to source potential ERM consultant that</p> <ul style="list-style-type: none"><li>● Highly Skilled - Evidenced competency and experience</li><li>● Effective and Efficient Process Design and Tools</li><li>● Minimizing the effort (burden) on the business by leveraging technology</li><li>● Their team</li></ul> <p>NEXT QUARTER</p> <ul style="list-style-type: none"><li>● Conduct virtual risk identification sessions</li><li>● Calibrate the key risks identified into top-tier risks and assess the risks against the criteria scales of impact, likelihood and management preparedness.</li></ul>

# Finance & Accounting



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# GOAL: Financial management and planning

What are your outcomes?

What impact / deliverables are you expecting?

LAST QUARTER

**Outcome 1:**  
Foundation management makes informed resource decisions to operationalize their programs and achieve intended outcomes.

**Outcome 2:**  
The Board, Executive team manages financial resources to lead the Foundation toward achieving our mission.

- We can fund our changing needs and new opportunities, through **Opportunity Fund** review process
- We are providing more timely and complete financial data to the Exec team and Board by **enhancing and speeding up monthly financial close**

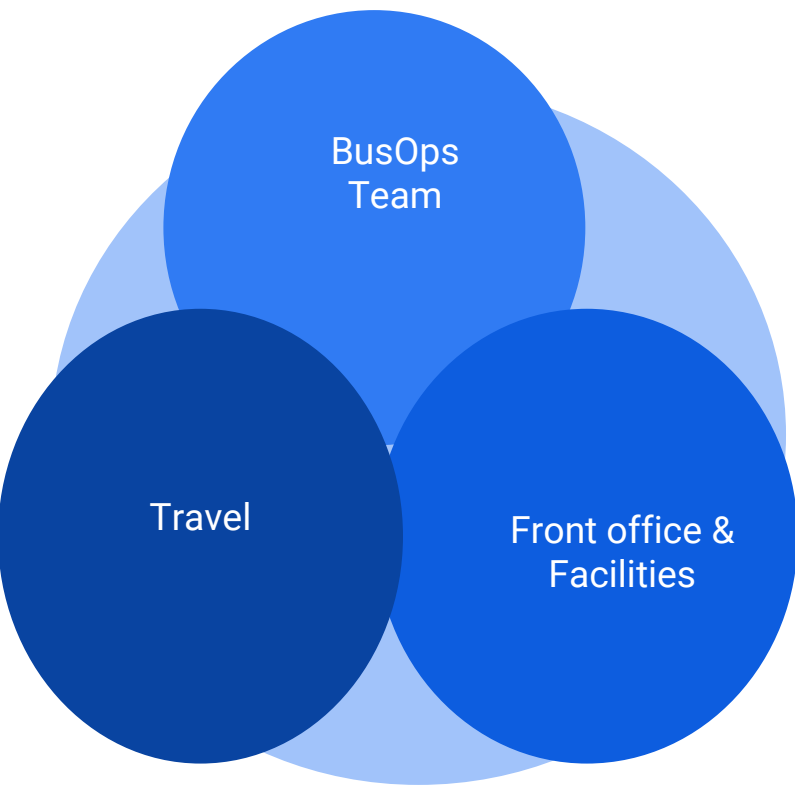
NEXT QUARTER

- Define our planning and budgeting process including multi-year components
- Testing of capturing expenses to program outcomes.

# Administration



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Administration (9)

### **Bus Ops team:**

- 75% of team new in last five months
  - Over the last two qtrs, developed and retained 4 staff as they grew into PM and Tech writing roles for other areas of organization.
  - Focus on engagement, training, development.
  - Redistributing work loads to meet demands in functions and activities.
  - Expanded work study intern program
- Responding and supporting BusOps improvement initiative lead by Controller
- Partnering on Org Wide Events Management efforts

### **Travel:**

- RFP and s/w selected for groups travel management s/w tool
- Groups Travel has doubled in the last two years

### **Front Office and Facilities:**



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Revive emergency volunteers for office fire and earthquake drills. (WERT Team)

# GOAL: Productive Working Environments

N/A

What is your objective / workflow?	Who are you working with?	What impact / deliverables are you expecting?
Discovery of HQ Utilization and meeting dept current needs	<b>LAST QUARTER July, August, September 2018</b>	
	<ul style="list-style-type: none"> <li>● Revise script for new badge system reporting for metrics</li> <li>● Continue discovery of team needs through direct engagement</li> </ul>	<ul style="list-style-type: none"> <li>● Determine metrics for working environment</li> <li>● Refine mix of furniture needed</li> <li>● Continue to work with each department, begin to break down barriers for more fluidity. Variety of leadership support</li> <li>● Continue to approach ME space and WE space.</li> </ul>
Develop vision of future working environments	<b>NEXT QUARTER: October, November December 2018</b>	
	<ul style="list-style-type: none"> <li>● Discovery and partnership with other org wide efforts</li> <li>● Continue department discovery</li> <li>● Determine measurement of success - Discover success factors from executive management</li> </ul>	<ul style="list-style-type: none"> <li>● Clarity and alignment of Global efforts</li> <li>● Re-ignite Workplace strategies working group with identified executive sponsorship</li> <li>● Create and align success factors for positive working environments.</li> <li>● Engage additional SME's for continued support and alignment in adaptation</li> <li>● Blend our remote and office culture</li> </ul>

## Next Quarter: Administration

### Group Key areas of focus:

### Strategy connections and high level planning for Administration Q2 2019

- **Include Administration at the strategic level regarding global efforts** collaboration.
  - Key Outcome: Identify success criteria for future working environments with executive team
- **All hands/2019** Support all areas of planning and volunteer support to meet new multi-day event goals and budget.
- **Bus Ops Improvement:** Continuing to manage the operational volume increases together with the business operational improvement, revision, documentation and training activities, including Travel tools and Event Management collaboration with CE
- **Overall Engagement:** Continued full team satisfaction and connection activities; application at the management, department and team levels for F & A department.
  - Application of the team performance model (Consultants, and Organizational Diagnosis for continued learning, attention and satisfaction.





# OIT October 2018 Check In



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# Systems/Network/Security:

- Systems Administrator transition
- Technical Debt Report
- Extending our work Cross Departmentally
  - Security - Support in Operationalizing Programs
  - Network - Collaborate regarding Office Networks

# A/V Improvements:

## Audio/Visual Improvements for streaming

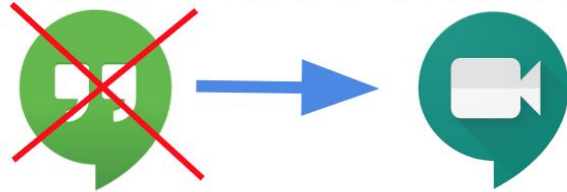
- Re-calibrated audio levels to maximize signal-to-noise ratio
- Implemented professional-quality video camera for public livestreams
- Added a third stage light for better stage lighting coverage



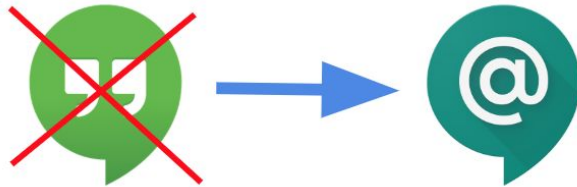
# A/V Improvements: Adoption of Conferencing Tools - Google product transition training

- Conducted Quarterly AV Training
- Updated all Google Suite documentation on Office Wiki
- Informational presentation regarding Google Suite product changes
  - New Google Calendar + updated GMail UI
  - Google Hangouts > Google Meet
  - Google Hangouts messaging > Google Chat
  - Google Hangouts deprecation - January 2019
  - Google Inbox Deprecation - May 2019

- Google Meet replaces Google Hangouts video meetings



- Google Chat replaces Google Hangouts instant messaging



# OIT - OnBoard Process Improvements

## Onboarding Follow up Training

- Created Presentation for Training purposes
- Reduction in amount of tickets received throughout the past few quarters
- Staff are more competent in the tools we provide



# OIT OnBoard Process Improvements

Collaborating with T&C, Team Admins to use the Orientation Planner:

- Defines roles and responsibility between Hiring Manager, T&C, OIT, and other key players in the onboarding process
- Shows delegated tasks during the onboarding process
- Helps make new hire feel welcomed and transition easily into their role





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## WMF New Hire Orientation Planner

**New Hire Name:**

**New Hire Personal Email:**

**Start Date:**

**Manager:**

**Orientation Coordinator:**  *(i.e. Dept Admin or HM Delegate, if needed)*

~ Please review and complete tabs 2 and 3 also in this workbook.  
 ~ Tab 5 contains answers to frequently asked questions about the New Hire Orientation Planner.

Add  more rows at bottom.



## Captured 90% of OnBoards for OIT Follow-up Training = Reduction of tickets

