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)
- **Africa:** Implementing a Campaign Partner Program (CaPP) experiment with The African Narrative and the Moleskine Foundation to build capacity of movement organizers and mission-aligned organizations to contribute to Wiki projects in Nigeria, Egypt, Rwanda, and Senegal. **Targets:** 900 new contributors, 100 professionals and 30 movement organizers trained, and a new African language Wikipedia created.
- **LatAm:** Partnership with Digimente, a media literacy education program in Argentina, Colombia, and Mexico, will integrate Wikipedia as a resource for training youth to discern factual, quality media content, and expands access to the Reading Wikipedia in the Classroom toolkit to new educators.

Worldwide Readership: Growing Readership (W-O6-D3), Elevate WMF Brand (B-O4-D22)
- **SE Asia:** Traveloka, the #1 travel app in SE Asia with more than 40M MAUs, now highlights (and attributes and links back to!) Wikipedia, WikiVoyage, and Commons content when a user searches for a destination. As part of the deal, WMF will receive data on user engagement to better understand reader behaviors in this fast-growing market.
- **Global:** Secured 4 global partners (Inter-American Development Bank, World Pulse, EQUALS, Digimente) to join Comm's Project Rewrite to engage new audiences in Emerging Markets and create strong brand associations.

**Target quarter for completion:** Q4 FY20-21
## Partnerships

### Key Results

<table>
<thead>
<tr>
<th>Test a minimum of 3 <strong>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</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year Goal</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td><strong>Baseline:</strong> 0 models tested</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Deliver best-in-class partnerships support to WMF departments, as measured by a <strong>Net Promoter Score</strong> of 70 or higher</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year Goal</td>
</tr>
<tr>
<td>&gt;70</td>
</tr>
<tr>
<td><strong>Baseline:</strong> 0 NPS score</td>
</tr>
</tbody>
</table>

Department: Advancement
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.

- **Successful product announcement to the public and the community.** New and extensive documentation of the project (and related conversation) on Meta and Mediawiki, as well as an announcement essay, FAQ, and statement of principles. Coordinated with Comms and Movement Comms on messaging and timing. Product announcement appeared in 172 articles globally and was well-received by the global community.

- **A new name and URL.** As part of the public announcement, renamed the product and team from Okapi to Wikimedia Enterprise (WME), hosted at https://enterprise.wikimedia.com/.

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>100%</td>
<td>15%</td>
<td>30%</td>
<td>65%</td>
</tr>
<tr>
<td>Status</td>
<td>100%</td>
<td>20%</td>
<td>30%</td>
<td>65%</td>
</tr>
<tr>
<td>Status</td>
<td>100%</td>
<td>25%</td>
<td>50%</td>
<td>85%</td>
</tr>
</tbody>
</table>

**Enterprise Department: Advancement**

**Q1: Develop and validate an initial business strategy**
- Status: 100%
- Baseline: 0% complete

**Q2: Develop a customer pipeline with a minimum of 5 soft commitments to a specific product and price point**
- Status: 15%
- Baseline: 0% complete

**Q3: Develop a model for the distribution of revenue across the Foundation, the endowment, and the community**
- Status: 30%
- Baseline: 0% complete

**Q4: Close at least 2 paying customers**
- Status: 65%
- Baseline: 0% complete

**Q1: Deliver a commercially functional alpha product**
- Status: 20%
- Baseline: 0% complete

**Q2: Support at least one partner organization in using a beta offering in order to validate product value**
- Status: 30%
- Baseline: 0% complete

**Q4: Ensure launch product is robust enough to support at least 2 paying customers**
- Status: 65%
- Baseline: 0% complete

**Q1: Develop a community engagement roadmap**
- Status: 25%
- Baseline: 0% complete

**Q2: Complete legal review of business & revenue strategy, approved by KPMG**
- Status: 50%
- Baseline: 0% complete

**Q3: Complete community engagement roadmap**
- Status: 85%
- Baseline: 0% complete

**Q4: Ensure modifications based on community feedback are in place**
- Status: -
- Baseline: 0% complete

**Q4: Draft terms of service and/or agreement templates for service engagements**
- Status: -
- Baseline: 0% complete
# Drill Down: Enterprise Q3 KR

<table>
<thead>
<tr>
<th>The situation</th>
<th>The impact</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Although we were originally assigned responsibility for developing a model for the distribution of revenue earned from the Enterprise project, as reflected in our Q3 KR1, the Foundation’s executive leadership has determined that the responsibility for developing this model should be held elsewhere inside the organization.</td>
<td>We are no longer directly responsible for developing this model. Responsibility for making this determination now lies with the Finance team — and ultimately with the Foundation’s Board of Directors, to whom the Finance team will make a recommendation.</td>
<td>Modify our expected result to reflect our new role in this process, which is to act as a stakeholder in the process of developing this model; to monitor the process to ensure that it is completed in a timely fashion; and to communicate the model out to the community and the public appropriately once it has been completed.</td>
</tr>
</tbody>
</table>
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)
- Ran campaigns in Sweden and Italy. Prepared for LATAM and India in Q4.
- Completed key steps toward transitioning the Endowment into a new 501c3, including WMF board resolution
- Kicked off virtual cultivation events

Target quarter for completion: Q3 FY20-21
## Key Results

<table>
<thead>
<tr>
<th>Goal</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>Raise $125 million for the Foundation (revised goal from $108M)</td>
<td>$125 million</td>
<td>$42 million</td>
<td>$124 million</td>
<td>$142 million</td>
<td>-</td>
</tr>
<tr>
<td><strong>Baseline:</strong> $0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<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>$115 million</td>
<td>-</td>
</tr>
<tr>
<td><strong>Baseline:</strong> $0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</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>
<td>$16 million</td>
<td>-</td>
</tr>
<tr>
<td><strong>Baseline:</strong> $0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<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>$18.6 million</td>
<td>-</td>
</tr>
<tr>
<td><strong>Baseline:</strong> $0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<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>$10.8 million</td>
<td>-</td>
</tr>
<tr>
<td><strong>Baseline:</strong> $0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<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>6 events held</td>
<td>-</td>
</tr>
<tr>
<td><strong>Baseline:</strong> 0 online events</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>135 planned giving commitments</td>
<td>135</td>
<td>58</td>
<td>697</td>
<td>813</td>
<td>-</td>
</tr>
<tr>
<td><strong>Baseline:</strong> 0 planned giving commitments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Welcome to the team

Luzelena Escamilla  
Strategic Partnership Specialist  
New York, NY, United States

Julia Brungs  
Senior Community Relations Specialist  
Helsinki, Finland

Kinneret Gordon  
Senior Research Partnerships Specialist (Contract)  
Tel Aviv, Israel

Edna Medina  
Staff Conversion Regional Partnership Manager, LatAm  
Bogota, Colombia

Runjini Murthy  
Staff Conversion Fundraising Analyst III  
Hawaii, United States
Online Fundraising

Raised $13.2M, exceeding quarterly goal and fiscal year goal. Grand total= $114.7M

- Ran *Thank You* banner and emails in English campaign countries- highlighting WP20!
- Ran fundraising campaigns in Sweden and Italy.
- Started English Email tests to diversify fundraising voices. Preparing for Planned Giving outreach, LATAM and India campaigns in Q4.
- Restructure the Online team into *Growth* and *Campaigns* teams, including new scopes and processes to create efficiencies.
Fundraising Operations

Fundraising Analytics
- Delivered data and key learnings from Q2 English Campaign
- Supported campaigns in Italy and Sweden

Wikipedia Store
- Signed store fulfillment contract with a new vendor and prepared store migration to improve customer service and streamline internal processes

Donor Relations
- Team name changed to Donor Relations to reflect the current role of the team, and align with other teams within the organization
- Supported campaigns in Italy and Sweden

Offline donation processing
- Processed $3.4M in offline donations, in collaboration with the MGFE team
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 $18.6 million, YTD
- Endowment total value is now $91.6 million

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

- Secured 813 commitments, YTD
  - 637 came from the US Thank You page
  - 719 were made via FreeWill
- This brings the total number of Wikipedia Legacy Society members to 1,220.
The Wikipedia Legacy Society now has 1,220 members ... and counting

Mark Ahn
Chance Amelsberg
Estate of Evan C. Bacon*
Jean Bilala
Joshua Aron Bloomfield
James Brennan
Mendell Calabia
Matthew Carlson
Katie Chesser
Julie Ann Coffey
Peter Compo
Raj Dhubha
Mr. David Donald
Dr. Douglas Lee Hall
Thomas E.
Thomas Flaherty
Samantha Geesling
Sean Christopher Howard Beam
Glasgow MD-PhD
Jessica A. Allen
Lakeisha Angel
Linda L. Bertiaux
Caiden Block
Fernando Botello
Aaron Paul Brock
Annette Campbell-White
Edward Noel Castro
Stephanie Chrismer
Melinda Cogen
Kathryn Guggenheim, M.D.
Emil Hanzevack and Theresa Long
Anita Hayes
Morgan A. Heien
Shannon Hickey-Flores
Robert M. Hust
William F. Jack
Rich Kerr
David E. LaBarge
Oscar Alexander Lakowicz
Jacob Levine
Andy Lowery
Justin Martin
Laura Mattox
Eileen E. McCauley
Christian Melchor
Katrina Milan
Kaska Miskolczi
Erik Hanson
Jamie Elizabeth Harrison
George W. Haywood Jr., USMC
Guillermo Herrera
Leslie Hunt
Ivan Igulo
Barbara Kelso
The Knowlton Shelnut Family Endowment
William Lai
S.M. Lemkowitz*
Gloria Y. Lopez-Hicks
Tyrell Mann-Sanford
Maite Carranza Martinez
Carolyln May
James McDow
Heather Marie Mercer
Frederick A. Miller III
Pete Misner
Edgar M. Moran, MD
Chris Fowler O’Connor
Melissa Pacetti
Chris Parker
Courtney J. Pavlovich
Estate of Karl Pfenninger*
Ronald E. Powell
Stacey Reeves
Angie Rozar
Anthony John Savory*
Brian Schulman
Richard Jay Seidel and Caren Kaplan*
Aaron Simons
Alf Stegmeyer
Duke Joshua Stow-Moulden
Susan Thaddies
Jennifer Kelly Trantanella
Robert Earl Whitworth
Donald Winslow
Scott Zajac
Priscilla S. Naizghi
Tyler O’Neill
Jim Pacha*
Bradford A. Patrick
Bar Perry
Estate of John Robert Phillips*
Mark Purves
Rikki and Guy Rehn
Michael Ray Russell
Elliott Schuchardt
Laura Sebastian Hundley
Donna Simmons
Matthew L. Stegall
Luke A. Stovall
Carson Sullivan
Joolie Thordarson
Latanya Webster
Elizabeth Windsor
Steven Dee Yeutter*
Endowment

Transitioning the Endowment to a new 501c3

Completed in Q3

- Internal and external counsel completed a review to re-affirm that setting up a stand-alone entity for the Endowment is still the best path forward.
- Wikimedia Endowment Advisory Board endorsed moving forward.
- Community communication was sent via Wikimedia-l to share our plans for the transition.
- WMF Board passed a resolution to endorse moving forward.
- Wikimedia Endowment Advisory Board made recommendations on governance of new entity.
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:** $3.4M in Q3. Surpassed fiscal year goal of $10M.
  - Thank you Sasha and admin team!
- **Planned and kicked off virtual cultivation events**
  - Audience: Current, lapsed, and potential high-capacity donors
  - Experience: small group, subject-specific content, access to Foundation leadership and subject area experts
  - Goals: Stewardship & engagement for Q2 donors. Cultivation towards a large ask for lapsed, potential donors and upgrade prospects.
- Revised individual responsibilities and team processes to create growth opportunities, increase efficiencies and resilience.
Fr-tech

Objective: Fr-tech and Advancement can plan and begin to execute on major reintegration and maintenance projects.

- **Launched Search kit for CiviCRM donor database**
  - A new search and reporting tool from CiviCRM core team
- **Investigated new payments tools and planned new integrations**
  - Assessed several payments tools for long term planning
  - Detailed assessment of credit card processor. Ready to start integration in Q4
- **Started drupal upgrade**
  - To be upgraded in Q4 or Q1
Questions

**Partnerships:** Yael Weissburg

**Enterprise:** Lane Becker

**Revenue:** Megan Hernandez

**Online Fundraising:** Pats Pena

**Fundraising Operations:** Jessica Robell

**Endowment:** Amy Parker

**Major Gifts & Foundations:** Caitlin Virtue

**Fr-tech:** David Strine
Acronyms

**APP:** Annual Planning Process

**OKAPI:** Open Knowledge Application Programming Interface

**Recurring:** Monthly recurring donations