Fundraising Quarterly Review

Wikimedia Foundation - Q2 of FY14-15

Agenda

Team intro - 2 minutes

What we said & did - 30 minutes

What we learned - 20 minutes

What's next - 10 minutes

Asks - 20 minutes

Team and staffing numbers slide

Lisa Gruwell

Damon Sicore   Toby Negrin

Major Gifts & Foundations
Caitlin Virtue

Online Fundraising
Megan Hernandez

Fundraising Operations
Pats Pena   Anne Gomez

Fundraising Tech
Katie Horn

Analytics
Ellery Wulczyn

Jonathan Curiel

Jessica Robell

Caitlin Cogdill

Adam Wight

Rosie Lewis

Peter Coombe

Victoria Shchepakina

Andrew Green

Elliott Eggleston

Sherah Smith
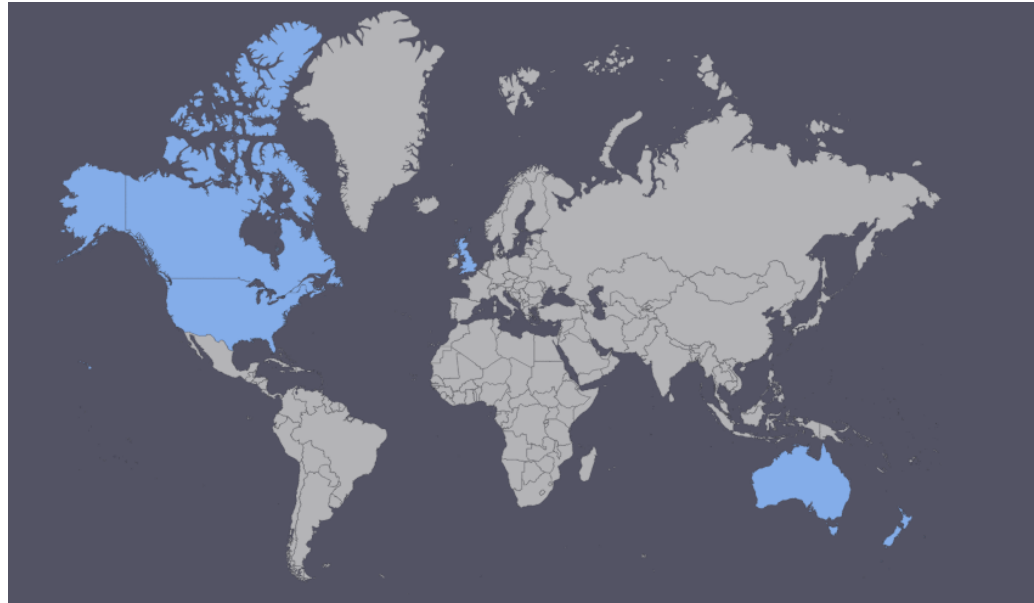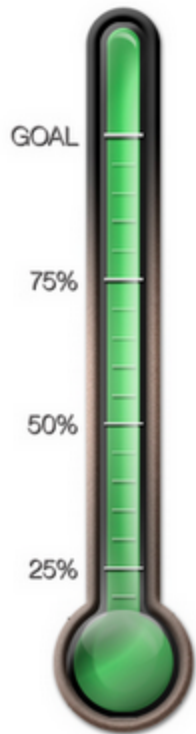
What we planned
&
What we did

Background: The biggest time for fundraising is in December

While we are now fundraising year round internationally, the bulk of our revenue comes in December annually from the 5 biggest English speaking countries.
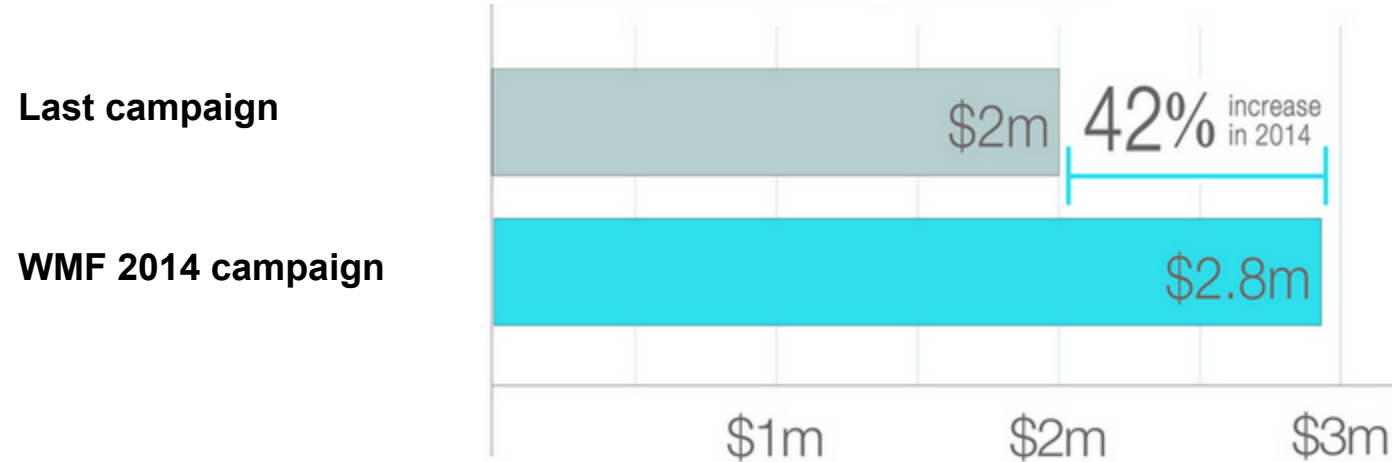
Year-to-date

GOAL

75%

50%

25%

100%
of our goal

$58.5
million raised

6 months
ahead of schedule

Fundraising - Q2 FY 2014-15

Objective	Impact on Goal	Dependency	ETA	Status
Raise $24 million in Q2 primarily through: 1) Banner and Email campaigns in Belgium, France, the United States, the United Kingdom, Australia, Canada, and New Zealand. 2) Foundations, Major Gift and Matching Gift appeals. (Goal: Commitments and/or gifts of $1.5 million) 3) Hold major donor event in San Francisco ($200K short-term goal).	Raise $58.5 million in FY 2014-15	Site traffic; FR-Tech	12/30/14	Way ahead! We raised $44 million this quarter. All goals here were exceeded.
Prepare for Q3 campaigns; Work with FR-Tech to plan Q3 new payment method integrations in Latin America and China.	Raise $58.5 million in FY 2014-15	FR-Tech	12/30/14	Done. Ready to begin work on a new e-wallet. We have settled in on a vendor for Latin America.
Implement new one time virtual card as a new payment method. Begin research on fundraising In-App	Develop mobile into an effective fundraising channel;	FR-Tech; Mobile team	12/01/14	Was not completed.
Start Interdepartmental Partnerships Tiger Team to define partnerships role and begin recruiting for a senior partnerships staff member.	Develop a strategy for the long term financial health of the organization	Tiger team members	12/30/14	The Partnership Tiger team successfully completed all of its work.

France Online Campaign

- $2.8 million in 2 week full-traffic campaign

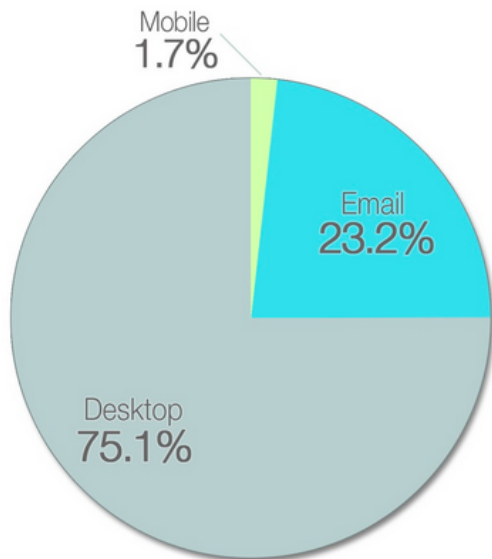- 42% increase from 2012 when $2 million was raised in 49 days

December Online Campaign

Pie chart:
- NZ 0.7%
- CA 6.2%
- AU 7.0%
- UK 10.8%
- US 75.3%

- $33 million raised
- 2.5 million donations
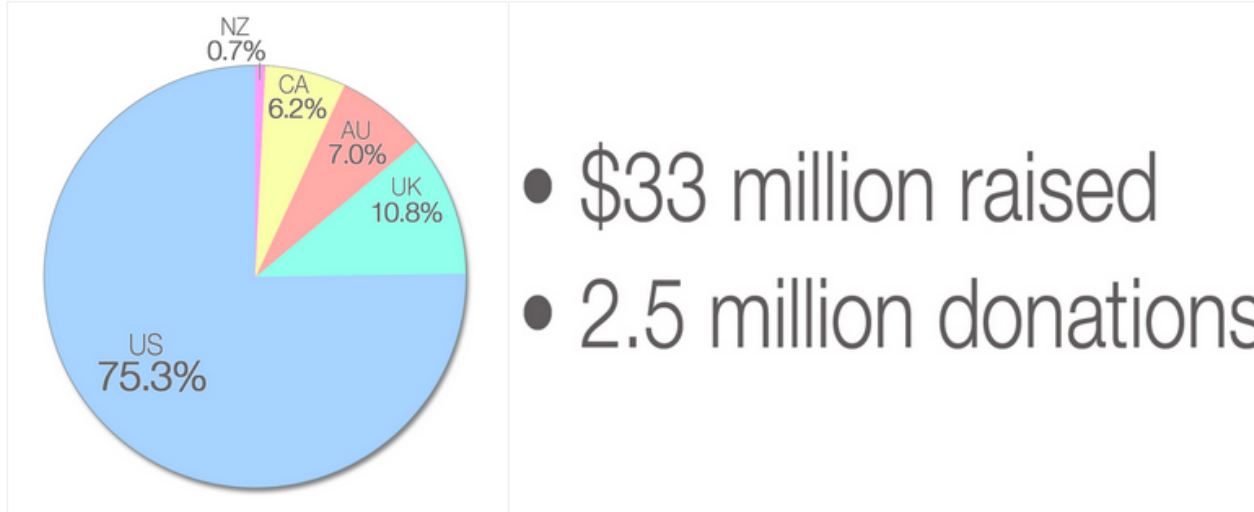
United States	United Kingdom	Australia	Canada	New Zealand
$22,786,261.26	$3,253,422.15	$2,122,173.47	$1,863,338.44	$201,496.52

Year-end campaign donation breakdown

2013

Mobile
1.7%

Email
23.2%

Desktop
75.1%

Desktop: $13.3m
Email: $4.1m
Mobile: $300k

2014

Mobile & Tablet
16.1%

Email
22.5%

Desktop
61.4%

Desktop: $19.4m
Email: $7.1m
Mobile & Tablet: $5.1m
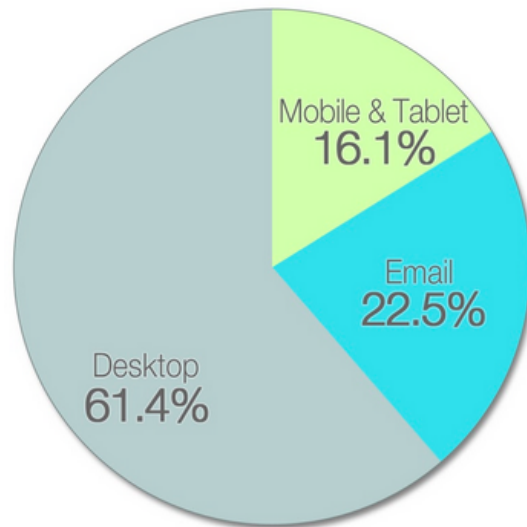
Example Desktop Banners

Desktop Banner donation rate (Large vs Small)

Large banner
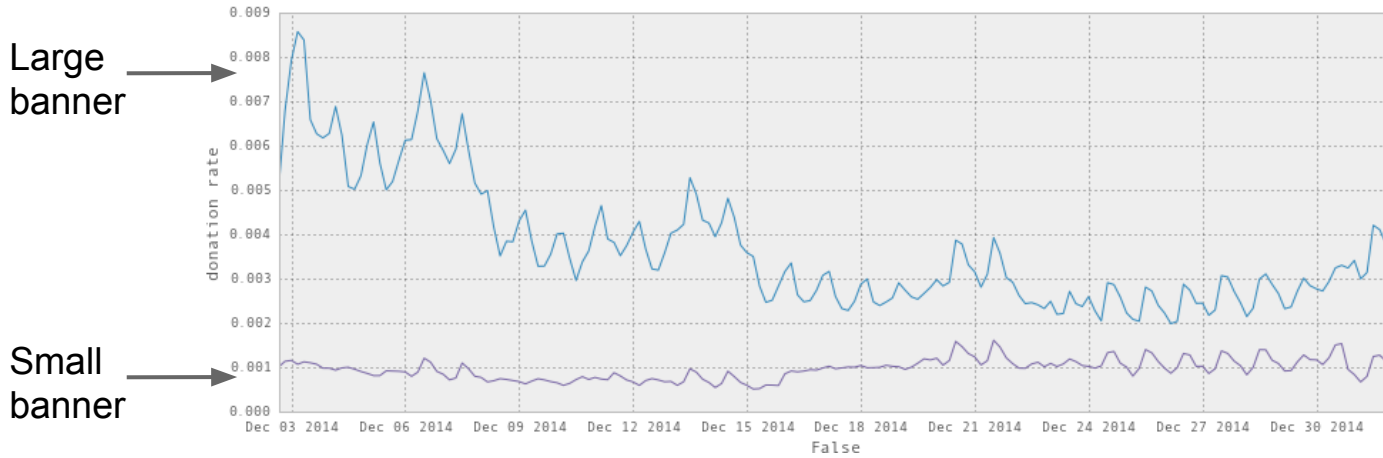
Small banner

60% of donors gave the first time they saw a banner.

Looking at the entire month of December, the donation rate of the large banners was roughly **5 times** greater than the donation rate of the small banner.

Banner Donations

2013

- Desktop 97.8%
- Mobile 2.2%

Desktop: $13.3m
Mobile: $300k

2014

- Desktop 79.2%
- Mobile & Tablet 20.8%

Desktop: $19.4m
Mobile & Tablet: $5.1m
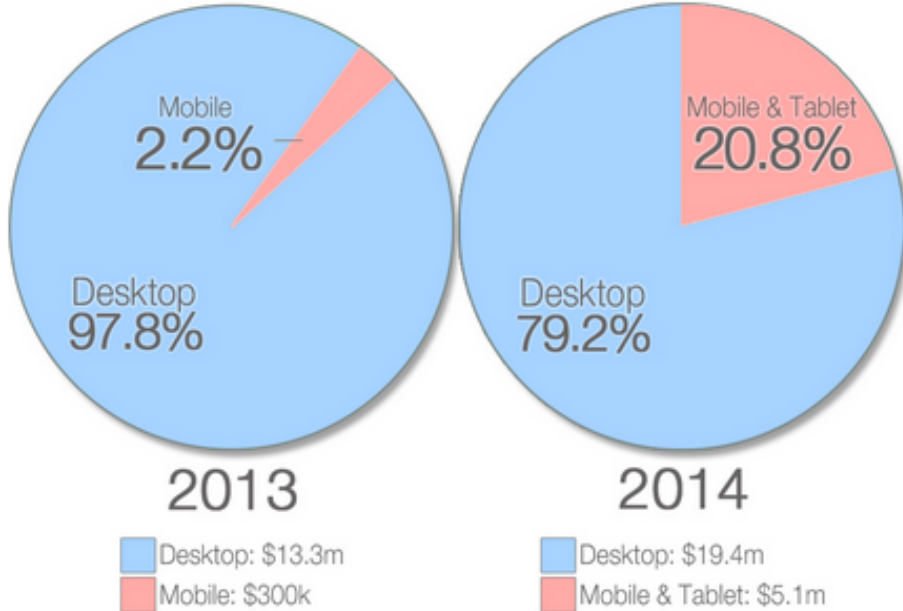
17X more donations on mobile and tablets in 2014 than in 2013.

Large Banner Donation Rate (by day/device)
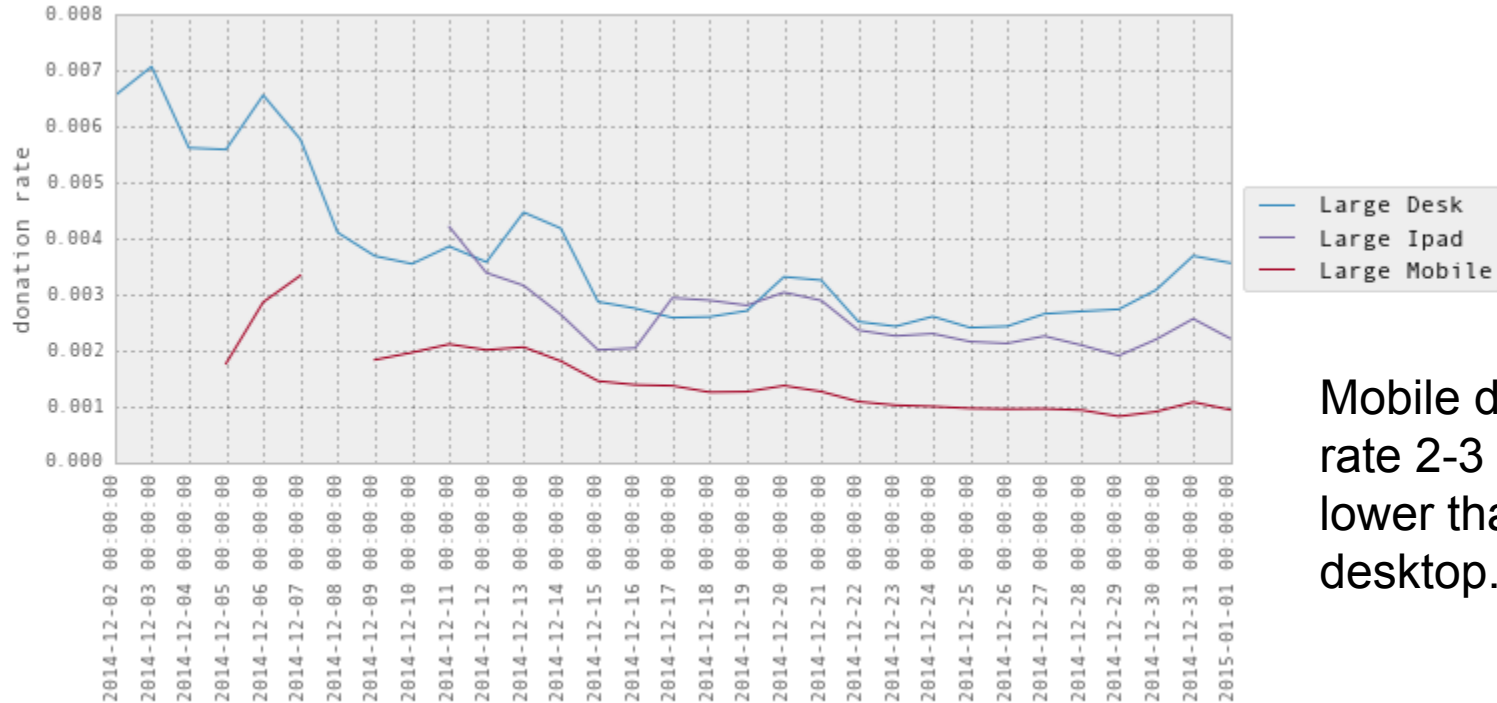
Mobile donation rate 2-3 times lower than desktop.

Email Fundraising

- 4,480,086 emails sent
- $7,171,201 raised
- Doubled number of email A/B tests from 2013

2013	$4.1m
2014	$7.1m

73% more revenue via email in 2014

$2m $4m $6m $8m
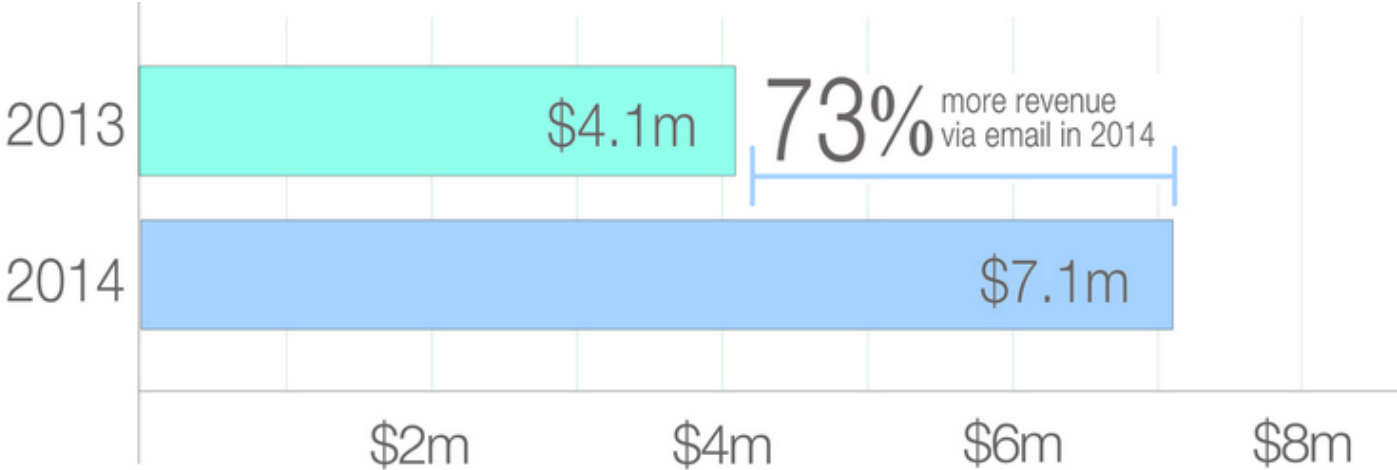
Major Gifts and Foundations

Financial Update

- $7.3 million raised FYTD. 121% to goal of $6 million
- Annual appeal campaign highlights (to date):
  - Launched Nov 18
  - $1.81 million raised
  - 1370 gifts
  - Average gift: $1,020

Q2 Projects

- San Francisco fundraising event raised $283,000 and introduced Lila to over 150 engaged donors in the SF Bay Area
- Language Engineering proposal written and likely funders list drafted
- Annual Report prep work. Release scheduled for Q3.
- Giant Rabbit reporting improvements to make it quicker & easier for MGF team to pull reports without outside assistance

Planning for Q3

- Implementing new payment methods for Brazil and Latin America
- Researching additional e-wallets

Fundraising Tech - Q2 FY 2014-15

Objective	Impact on Goal	Dependency	ETA	Status
New credit card processor for France	Fundraising team able to meet their goals in France			Completed
New integration using virtual one time cards	Increase efficacy of mobile campaigns	Outside Contractor	12/01/14	Was not completed
Launch internal fundraising dashboard	Greatly improve visibility for the donation pipeline		12/01/14	Completed
Prepare for the Big English fundraiser • Critical bug fixes relating to EN payment methods • Upgrade internal currency conversion API to new version • CentralNotice changes to support new campaign-related needs	Will not be able to launch Big EN without these changes		11/30/14	Completed
Upgrade for nightly reconciliation file parsing (WX)	Without the upgrade: Potential ongoing (recoverable) loss of data integrity within CRM		12/31/14	In Progress
Support for Big English fundraiser • Quickly address technical issues • Monitor donation pipeline for emerging issues	Any downtime and seemingly small bugs are surprisingly expensive in December.		12/01 - 12/31/14	Completed
Civicrm: Dedupe module	Run efficient and accurate donor-related queries		12/31/14	In Progress

Other accomplishments

Continuously improving our process

- Working with Team Practices on our pain points
- Tech team moved to phabricator shortly after Big English (beginning of January)

What we learned

Research Matrix for the English Fundraiser

What People Do	What People Think	What People Say
Donations *2.5 million donors*	Donor Survey *250,000 donors*	Donor Services *24,549 emails tagged*
A/B Tests *350 banner variations*	Reader Surveys *2 x 1200 readers; 1 x 2500 readers*	Social Media *Analysis in progress*
User Testing *20 tests*	Focus Groups *In progress*	Wikimedia-l and Meta *Analysis in progress*

What we learned: technical

- The existing system requires a lot of regular maintenance, particularly surprise changes to 3rd party integrations. Planning could be much more sensitive to this.
- Tech can't on-board people in a reasonable amount of time, even for relatively straightforward and well-defined tasks. Based on E-wallet experiment, we need:
  - Documentation geared toward on-boarding people who are unfamiliar with our codebase(s)
  - Major cleanup in the settings required to get a working replica of the donation pipeline

What's next

Fundraising Goals - Q3 FY 2014-15

Objective	Impact on Goal	Dependency	ETA	Status
Raise $3 million in Q3 primarily through: 1) Banner and Email campaigns in Israel, Hungary, Sweden, Denmark, Norway, and Spain. 2) Foundations, Major Gifts: Send out annual report; Send proposals to four new institutional donors and secure a multi-year commitment from one new funder	Raise $58.5 million in FY 2014-15	Site traffic; Institutional donors; Communications for the annual report	3/31/15	We are preparing to launch these campaigns.
Research: Complete a study our December fundraiser using a professional outside opinion research firm	Develop a strategy for the long term financial health of the organization	Research firm	2/28/15	We are preparing to share our research report by March 1.
Implement new e-wallet in China; Prepare to implement new payment provider in early Q4	Raise $58.5 million in FY 2014-15	FR-Tech; Payment providers	3/31/15	E-wallet is ready to test!
Partnerships: 1. Hire a VP of Partnerships 2. Write a partnerships plan	Develop a strategy for the long term financial health of the organization	Recruiting	3/31/15	We are actively recruiting a VP of Partnerships. Nearly 200 applicants so far.

Fundraising Tech Goals - Q3 FY 2014-15

Objective	Impact on Goal	Dependency	ETA	Status
PCI Compliance Assessment	Security	External PCI consultants	2/15	Waiting on contract for legal review
New payment method: E-Wallet	Enable fundraising in China		1/15	Completed!
New 3rd party integration	Enable fundraising in Latin America		3/15	Early stages: Documentation Review
Upgrade for nightly reconciliation file parsing with current vendor	Security		1/15	In Progress, from last quarter
Ongoing refactoring and code hygiene improvements in DonationInterface whenever possible. For more precise goals, see https://www.mediawiki.org/wiki/Extension:DonationInterface/Refactor_2015	Allow for temporary help in a timely manner, make all devs *not* want to avoid us and/or quit		3/15	In progress, hopefully forever
Reporting Improvements ● Improvements to CentralNotice tracking ● A/B componentes for the internal dash ● Custom civicrm reports (to be upstreamed)	Increase visibility		3/15	Starting 2/15

Asks

- Reqs and budget for fundraising tech, support from a dedicated scrum master
- Design support
- Improved readership analytics
- Support around community engagement
- Explicit discussion within the organization about traffic decline in the wealthy countries & how it threatens our small donor revenue model