Agenda

- Operations update
- Strategy workshop
- Working lunch
- Risks briefing
- Annual plan
  - Priorities & budget
  - Programs & discussion
- Endowment
- Board business
  - Role, challenges, future
  - Recruiting
  - Approvals
- Executive session
Operations update
Revenue & Fundraising
FY17-18 Jul - Mar
YTD revenue

The variance in March is due to timing. The team ran campaigns originally planned for March earlier in the fiscal year.

Further information:
- All FY17-18 planned major gifts have been recorded
- Q4 expected to be around $3 million
Financial overview
FY17-18 Jul - Mar
Spending highlights

Year to date budget variance reduced to -6%

Principal variances

- Donation processing fees have increased in proportion to online fundraising revenue +$0.8M
- Legal fees and consulting expense (action opposing government blocking of site) +$0.2M
- Filled positions increased YTD by 26 to 283. The Foundation currently has 311 total positions. -$1.4M
- Revised travel and contract services timing and utilization -$1.5M

YTD Budget $55.1M
YTD Actual $51.8M -6%
YTD expense variance reduced to -6%

We will continue to reduce the -6% variance by focusing investments in programmatic activities for the remaining of FY17-18.

- Accelerating hiring
- Endowment transfer
- Wikidata certification
Metrics update
Key Metrics: March 2018

### Search
Tools and user flows for discovering content

<table>
<thead>
<tr>
<th>Metric</th>
<th>MoM</th>
<th>YoY</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Engagement</td>
<td>35%</td>
<td>-2.78%</td>
</tr>
<tr>
<td>Search Load Time</td>
<td>571ms</td>
<td>+5.16%</td>
</tr>
</tbody>
</table>

### Readers
User flows including Community Tech, Apps, Desktop & Mobile Web content

<table>
<thead>
<tr>
<th>Metric</th>
<th>MoM</th>
<th>YoY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pageviews</td>
<td>15.7 B</td>
<td>-1.5%</td>
</tr>
<tr>
<td>— Desktop</td>
<td>7.3 B</td>
<td>-1.0%</td>
</tr>
<tr>
<td>— Mobile Web</td>
<td>8.2 B</td>
<td>+1.2%</td>
</tr>
<tr>
<td>Unique Devices (all WP)</td>
<td>1.58 B</td>
<td>+6.1%</td>
</tr>
</tbody>
</table>

The year-over-year decrease in total pageviews has become smaller again once again this month, due to both desktop and mobile.
As before, apparent causes for the year-over-year drop include the rollout of the page previews feature and a decline in Google referrals; see the recent quarterly Readers metrics presentation for more detail. This (slight and intentional) cannibalizing effect of page previews could grow following the feature’s full deployment in mid-April.

Sources and further details, also on mobile apps usage: https://www.mediawiki.org/wiki/Wikimedia_Audience#Readers

Pageviews normalized to 30 days/month

### Contributors
Collaborative, inclusive tools and user flows for creating and editing

<table>
<thead>
<tr>
<th>Metric</th>
<th>MoM</th>
<th>YoY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Editors</td>
<td>86.2 K</td>
<td>-1.4%</td>
</tr>
<tr>
<td>— New (First-month)</td>
<td>17.6 K</td>
<td>-10.0%</td>
</tr>
<tr>
<td>— Second-month</td>
<td>4.4 K</td>
<td>-4.7%</td>
</tr>
<tr>
<td>— Existing</td>
<td>64.2 K</td>
<td>+1.5%</td>
</tr>
<tr>
<td>Non-bot Edits</td>
<td>25.2 M</td>
<td>+25.0%</td>
</tr>
<tr>
<td>Mobile Edits</td>
<td>1.1 M</td>
<td>+21.0%</td>
</tr>
<tr>
<td>New Editor Retention</td>
<td>5.2 %</td>
<td>-26.5%</td>
</tr>
</tbody>
</table>

Not a single metric recorded a month-over-month decline in March, which is reasonable considering that it was 11% longer than the previous month.

The year-over-year trends are consistent with long-term patterns: a concerning decline in new active editors, a slow growth in existing active editors, and a substantial growth in mobile edits which is gradually slowing down (this month’s year-over-year growth was the slowest in almost 2 years).

The substantial year-over-year drop in the new editor retention rate is not part of a clear pattern of decline—the rate regularly fluctuates by similar amounts.

Source: Discovery Dashboards / Search Metrics / Monthly

https://www.mediawiki.org/wiki/Wikimedia_Audiences
Pageviews by access type

Wikimedia monthly pageviews (desktop+mobile), 2013-2018
Pageviews year-over-year
May 2013 - Feb 2018
Board dashboard proposal
Goal

Create a set of metrics to be shared with the board to assess overall ecosystem health and impact of our specific programs
Proposal

We report on two sets of connected metrics:

- A set of topline “movement level metrics” to show overall impact and health of the movement
- Results of programs designed to drive these metrics via specific, targeted interventions
## Movement level metrics

<table>
<thead>
<tr>
<th>Strategic Goal</th>
<th>Area</th>
<th>Measurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reach</td>
<td>Consumers</td>
<td>Unique Devices</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pageviews, previews</td>
</tr>
<tr>
<td>New Content</td>
<td>Contributors</td>
<td>Number of articles, media files, data elements</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Number of content edits, uploads, data edits</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Active Editors (all projects)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Editor Retention (2d month)</td>
</tr>
<tr>
<td>Diversity</td>
<td>Both</td>
<td>Geography, Platform, Language, Project</td>
</tr>
</tbody>
</table>
## Connecting to programs

<table>
<thead>
<tr>
<th>Strategic Goal</th>
<th>Area</th>
<th>Measurement</th>
<th>Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reach</td>
<td>Consumers</td>
<td>Unique Users</td>
<td>SEO, New Readers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pageviews</td>
<td>SEO, New Readers</td>
</tr>
<tr>
<td>New Content</td>
<td>Contributors</td>
<td>Number of articles, media files, data elements</td>
<td>Local Language Content, Onboarding, Wikidata, SDoC</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Number of content edits, uploads, data edits</td>
<td>Mobile Editing, LLC, Onboarding, SDoC, Wikidata</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Active Editors (all projects)</td>
<td>Mobile Editing, LLC, Onboarding</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Editor Retention (2d month)</td>
<td>Onboarding</td>
</tr>
<tr>
<td>Diversity</td>
<td>Both</td>
<td>Geography, Platform, Language, Project</td>
<td>Mobile Editing, LLC, Onboarding, SDoC, Wikidata</td>
</tr>
</tbody>
</table>
## Potential movement level metrics

<table>
<thead>
<tr>
<th>Strategic Goal</th>
<th>Area</th>
<th>Measurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reach</td>
<td>Consumers</td>
<td>Retention</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Time spent</td>
</tr>
<tr>
<td>New Content</td>
<td>Contributors</td>
<td>Quality (across text, media, data)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Diversity (content coverage)</td>
</tr>
<tr>
<td>Diversity</td>
<td>Both</td>
<td>Demographics (gender)</td>
</tr>
</tbody>
</table>
Open Issues

- Impacts we can’t measure yet
  - Diversity metrics
  - Community Health metrics
  - We probably need to start with baselines
- Connecting to Annual Plan and Movement Strategy goals more explicitly
  - e.g. Evolve our systems and structures
- Including initiatives outside of product
Caveats

- Our privacy policy makes it more difficult (and in some cases impossible) to calculate industry standard metrics, particularly for Readers; we have prioritized privacy far beyond any other top internet site (and indeed, overall)
- Our data systems aren’t where we want them to be across the board
- Some things we care about, particularly some aspects of diversity and content, can’t be measured well at the current time
- Our total metrics are driven by a large number of factors, many outside of our control – it’s hard for any one program to move the topline metrics quickly
Next Steps

- Internal consensus on approach
- Address diversity and community health metrics
- Review with board
- Create metric creation and upload process
- Iterate as new metrics and programs are created
- Timelines and schedules
Talent & Culture overview
CCE hiring plan

- Candidate Search: 26th March – 24th April
- Shortlist: 4th June
- Informal Interviews: 7th – 8th June
- Formal Interviews: 26 – 27th June
- Secondary Panel: 2nd – 3rd July, or 5th July
- Decision: 9th July
- Offer Sent: 9th – 10th July
- Note: several variables may push out this timeline
CCE by the numbers

- 344 contacted, with another 200 planned
- 23 contacts declined
- 57 candidates applied
- 17 recommendations received
Strategy workshop
Agenda

15 minutes (Nicole/Katherine)
- Current status
- Phase II overview
- Strategy team

15 minutes (Rob)
- WMCON strategy track overview

10 minutes (Katherine)
- Possible themes

60 minutes (Rob)
- Discussion
Current status & next steps
We have a direction!
The strategic direction

By 2030, Wikimedia will become the essential infrastructure of the ecosystem of free knowledge, and anyone who shares our vision will be able to join us.

We, the Wikimedia contributors, communities, and organizations, will advance our world by collecting knowledge that fully represents human diversity, and by building the services and structures that enable others to do the same. We will carry on our mission of developing content as we have done in the past, and we will go further:

Knowledge as a service: To serve our users, we will become a platform that serves open knowledge to the world across interfaces and communities. We will build tools for allies and partners to organize and exchange free knowledge beyond Wikimedia. Our infrastructure will enable us and others to collect and use different forms of free, trusted knowledge.

Knowledge equity: As a social movement, we will focus our efforts on the knowledge and communities that have been left out by structures of power and privilege. We will welcome people from every background to build strong and diverse communities. We will break down the social, political, and technical barriers preventing people from accessing and contributing to free knowledge.
Now we determine how we get there.
What we can build on today

- A Strategic Direction with support across the movement
- Research and sources from Phase 1 and earlier (e.g. Chapters Dialogue)
- A window of opportunity that is wide open right now!
- Improved trust and stronger relationships across the movement
- Our community, identity, brand and connections
- Interest & engagement from different movement groups who already started to contextualize the direction in their work (partnerships and diversity groups)
Phase II
The big picture

- 2017-18 Strategy Year
- 2018-19 Transition Year
- 2019-20 First year of the strategy
The work ahead

- **At every level:** How do we evolve in a healthy and consistent way? What do we need to change or adapt as we move toward the essential infrastructure for free knowledge?
- **Across the movement:** What are the critical questions we, as a movement, need to resolve around **roles, resources and responsibilities**, in order to be successful?
- **In movement organizations:** How do we contextualize and apply the direction? What sort of programs and efforts should we undertake? What are our first priorities?
- **For projects and individuals:** What are the priorities for individual Wikimedia projects, or within projects? What do contributors need and care about?
In other words...

- **Conceptual**: Constant and stable change process for the next two years, to guide the movement towards becoming the essential infrastructure for free knowledge; a journey towards cultural change; ensuring inclusivity, openness and clarity

- **Structural (meta)**: Discourse around roles, resources and responsibilities, resulting in recommendations as well as agreement and process for implementation

- **Programmatic**: Contextualizing of the direction and the creation of goals and plans on organizational levels, incl. support, coordination and innovation across the movement

- **Tactical**: Project and community oriented processes and development guided by the key organizations’ departments (see product and program recommendations from phase 1)
Scope of Phase II

The Wikimedia movement aims to become the essential infrastructure for free knowledge.

But we are many different pieces, individuals, and groups, with different strengths and situations, with complex relations.

How do we move forward? Do the things that we do today address our goals in an optimal way? Do we have the resources and capacities that we need? How do we manage the change?

- Over the next few years, individuals and movement organizations will be working to apply the direction in their own work.
- We’re also launching a process to address the questions at the movement level: the ways we relate to each other and work together.
Phase II: Movement level
A movement-level effort

What will be the same? We will:

- Build a core team to facilitate and coordinate the process
- Assemble working groups and advisors from across the movement
- Conduct research and document our efforts
- Consult broadly, in many languages, in many forums
- Use WMCON and Wikimania as opportunities to test ideas and get feedback
- Make recommendations to the whole movement
A movement-level effort

What will be different?

- The core team will be made up primarily of Wikimedians and people from Wikimedia organizations (instead of external consultants)
- Our efforts will be focused on how we can be successful at making progress against the strategic direction, rather than “interpreting” it for new meaning
- We already have some initial areas of exploration, defined in Phase I
- The Wikimedia Foundation has invited Nicole Ebber from WMDE to coordinate and facilitate the process
## Overview Roadmap 2018-2020

**Work in progress (as of April 2018)**

<table>
<thead>
<tr>
<th>2017 (what we have)</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trust &amp; relationships</strong></td>
<td>Contextual: Constant change process towards becoming the essential infrastructure for free knowledge. Cultural change; inclusive, open, transparent, true to our values.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Research, Data</strong></td>
<td>Structural: Roles, resources, and responsibilities. Recommendations, agreement, and processes for implementation</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Strategic direction</strong></td>
<td>Programmatic: Contextualizing of the direction and the creation of statements of intent on organizational levels, inkl. support, coordination and innovation across the movement</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Community, identity, brand</strong></td>
<td>Tactical: Project and community oriented processes and development guided by key organizations.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Led by Core team
Informed by Core team
Monitored by Core team*
## Breakdown Roadmap 2018-2020

<table>
<thead>
<tr>
<th>Workstream</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contextual</td>
<td>Set-up of the process, stakeholder awareness, ensure participation &amp; inclusivity, facilitate change</td>
<td>Pilot and implement short term changes, transformation, iteration, sustainability</td>
<td>next steps</td>
</tr>
<tr>
<td>Structural</td>
<td>Identify key themes; working groups: inventory, research, scenarios, recommendations.</td>
<td>Transformation, iteration, agreement</td>
<td>Alignme nt, next steps</td>
</tr>
<tr>
<td>Programmatic</td>
<td>Organizational planning; support and coordination</td>
<td>Experimenting, iteration, evaluation</td>
<td>alignme nt</td>
</tr>
<tr>
<td>Tactical</td>
<td>Project and community oriented processes and development guided by key organizations.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Breakdown Roadmap 2018

### Workstream

**Workstream**

- **Conceptual**
- **Structural**
- **Programmatic**
- **Tactical**

### Timeline

<table>
<thead>
<tr>
<th>Workstream</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Feb</td>
<td>Mar</td>
<td>Apr</td>
<td>Jun</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Conceptual</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Structural</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Programmatic</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Tactical</strong></td>
<td>(Annual) planning</td>
<td>(Annual) planning</td>
<td>(Annual) planning</td>
<td>(Annual) planning</td>
</tr>
</tbody>
</table>

### Details

- **WMCON**
  - Set-up, budget, team, process design, governance; movement outreach
- **W.mania**
  - Communications, Outreach, translation, info production
- **Break**
- **Board mtg.**
  - Evaluate and define next steps
- **Communications, Outreach, translation**
  - Develop recommendations
- **Contextualize the direction, coordinate across movement orgs.**
- **Explore and experiment**

**Led by Core team**

**Informed by Core team**

**Monitored by Core team**

**Work in progress (as of April 2018)**

**Project and community oriented processes and development guided/facilitated by key organizations.**
Sample key themes

- **Roles: Governance and structures**
  - How can we live up to our value of equity in our global structures and decision making processes? What are our goals for movement structures (e.g. national representation)?

- **Resources: Funding and capacities**
  - How can we rethink development, capacity building, learning, events, revenue models and funds dissemination in the movement so that they reflect our values of service and equity?

- **Responsibilities: global, regional, and local levels**
  - How do we share global, local and thematic responsibilities within and beyond our movement? How do we get those involved who are not part of the movement, yet?

Themes and questions will be defined and prioritized in consultation with movement stakeholders.

Recommendations for each theme will be developed by the working groups.
The working groups

- Launch at Wikimedia Conference
- One group per key theme (6-8 themes, 5-15 members per group)
- Working groups develop recommendations for key themes
- Each group led by group lead (existing staff of a movement organization; paid backbone for the working group)
- Groups consist of volunteers, staff and experts from within and outside of the movement; one BoT member per group as a liaison; diversity is mandatory
- The groups will be equipped with budget for research, travel, and training, and a facilitator/project manager (flexible costs, not included in budget, yet)
- Exchange and coordination between the groups is mandatory
- Governance model and legitimacy of the groups and its members need to be clarified
## Strategy team

<table>
<thead>
<tr>
<th>Job description</th>
<th>Filled by</th>
<th>Wikimedia organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Lead / Program Manager</td>
<td>Nicole Ebber</td>
<td>WMDE</td>
</tr>
<tr>
<td>Process Architect</td>
<td>Kaarel Vaidla</td>
<td>WMEE (former) - WMF contractor</td>
</tr>
<tr>
<td>Process Support Lead</td>
<td>Bhavesh Patel</td>
<td>N/A - WMF contractor</td>
</tr>
<tr>
<td>Information &amp; Knowledge Manager</td>
<td>TBC</td>
<td>WMF contractor</td>
</tr>
<tr>
<td>Project Manager</td>
<td>TBC</td>
<td>WMF contractor</td>
</tr>
<tr>
<td>Project Assistant</td>
<td>Anne Kierkegaard</td>
<td>WMDE</td>
</tr>
<tr>
<td>Thought &amp; Process Facilitator</td>
<td>Anna Lena Schiller</td>
<td>N/A - WMDE contractor</td>
</tr>
</tbody>
</table>
## Support team

<table>
<thead>
<tr>
<th>Job description</th>
<th>Filled by</th>
<th>Wikimedia organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>WMF Discussion Coordinator</td>
<td>TBC WMF staff</td>
<td>WMF</td>
</tr>
<tr>
<td>Communication</td>
<td>TBC WMF staff</td>
<td>WMF</td>
</tr>
<tr>
<td>HR and Legal</td>
<td>TBC WMF staff</td>
<td>WMF</td>
</tr>
<tr>
<td>Working Group Leads</td>
<td>TBC</td>
<td>Wikimedia organizations</td>
</tr>
<tr>
<td>Working Group members (Volunteers)</td>
<td>TBC</td>
<td>Wikimedia community</td>
</tr>
<tr>
<td><em>Language Liaisons Coordinator</em></td>
<td>TBC</td>
<td>WMF</td>
</tr>
<tr>
<td><em>Language Liaisons</em></td>
<td>TBC</td>
<td>WMF</td>
</tr>
<tr>
<td>Title</td>
<td>To do</td>
<td>When?</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>Team</td>
<td>- Onboard the Team</td>
<td>April/May</td>
</tr>
<tr>
<td></td>
<td>- Hire Project Manager; Information &amp; Knowledge Manager</td>
<td>April/May</td>
</tr>
<tr>
<td>Key Themes</td>
<td>- Identify themes and prioritize questions</td>
<td>April/May</td>
</tr>
<tr>
<td>Working Groups</td>
<td>- Form and recruit working groups according to themes</td>
<td>April/May</td>
</tr>
<tr>
<td></td>
<td>- Agree upon governance model for decision making for each theme</td>
<td>May/June</td>
</tr>
<tr>
<td></td>
<td>- Live consultation at Wikimania</td>
<td>July</td>
</tr>
<tr>
<td></td>
<td>- Work on recommendation for answering the questions</td>
<td>July-October</td>
</tr>
<tr>
<td></td>
<td>- Work on ways to implement the recommendations</td>
<td>2019</td>
</tr>
<tr>
<td></td>
<td>- Refining recommendations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Start implementing and iterating</td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td>- Wikimedia Conference</td>
<td>April</td>
</tr>
<tr>
<td></td>
<td>- Regional Events</td>
<td>May-June</td>
</tr>
<tr>
<td></td>
<td>- Wikimania</td>
<td>July</td>
</tr>
</tbody>
</table>
Phase II: Wikimedia Foundation
## Timeline

<table>
<thead>
<tr>
<th>FY17-18</th>
<th>FY18-19 (transition year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3</td>
<td>Q4</td>
</tr>
<tr>
<td>Annual planning</td>
<td>Strategic planning</td>
</tr>
<tr>
<td>Community consultation on Annual Plan</td>
<td>Community consultation on WMF priorities</td>
</tr>
<tr>
<td>Identify WMF medium-term priorities</td>
<td>Convert priorities to medium-term plan</td>
</tr>
<tr>
<td>AH/DevSummit</td>
<td>WMCON</td>
</tr>
<tr>
<td></td>
<td>Wikimania</td>
</tr>
<tr>
<td>Q1</td>
<td>Q2</td>
</tr>
<tr>
<td>Annual planning</td>
<td></td>
</tr>
<tr>
<td>Community consultation on Annual Plan</td>
<td></td>
</tr>
<tr>
<td>3-5 year (medium-term) strategic plan</td>
<td></td>
</tr>
<tr>
<td>AH/DevSummit</td>
<td>WMCON</td>
</tr>
<tr>
<td>Q3</td>
<td>Q4</td>
</tr>
<tr>
<td>Community consultation on Annual Plan</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
WMCON strategy track overview
Movement Strategy Track
... and the Board’s role
Introduction

• Our facilitation team...
• Today a strategy track taster, *soupçon*...
Overview

1. The **strategy process** as a whole
2. The **strategy track** during the conference
3. The likely ‘working groups’
4. Discussion of the Board’s role in the process, and particularly the conference track
5. Identifying how the Board will engage with the Working Groups...
A portfolio of ‘Input Documents’ that provide guidance to the Strategy Team in designing the next steps of the process.

**THE BIG PICTURE**

[Everyone together]

**Past and Present**

Bringing everyone to the same place so we can start the 3 days with a shared understanding.

**CHALLENGES**

To identify the things that stop us engaging with our opportunities.

_The things that get in the way are the way…_

**WAY FORWARD**

Working Groups

Identifying **practical actions/solutions** and Areas of Action that could address challenges and move towards opportunities of the SD.

**POSSIBILITIES**

To envision the Strategic Direction for each person and the movement in the next 3-5 years
Possible themes
Building on November

- Capacity Building
- Resources (financial and otherwise)
- Governance (roles and responsibilities)
- Partnerships
- Diversity/Inclusion
- Technology
- Community Health
- Events
Discussion
The Board and the conference

• Now we are going to explore the implications of all this…
• What stands out to you from what you’ve heard?
• 5 MINS In pairs
• When you think of your board role…
  • Where are you most confident? More hopeful?
  • Where are you less confident? More concerned?
The Board and the conference

• 10 MINS - In threes…

• Discuss the opportunities and risks for the Board over the next four days

• Sharing
The Board and the conference

• In what ways can the board commit to working – collectively and individually – during the strategy track and after the conference?
• Write your ideas on the A5 cards provided...
The Board and the conference

• Hand up your two clearest cards
• Any pairs that go together?
• Hand up two cards that are different
• Are there any other cards that go together?
• Place any remaining cards in the column where it fits… or in a new column.
Shared principles

• What is the principle that defines the cards in each cluster?
Moving forward...

• Where is the board naturally strongest? Where are you more or less confident?
• Is anything missing?

• What would be the most effective approach for the board to take with the working groups?
Wrap up...
Process
Annual Plan timeline

**March 21**  
Present draft budget at Audit Committee Meeting

**March 27**  
Present draft plan at Board of Trustees Meeting

**March 29**  
Publish draft plan and budget on Meta for community review

**April 1 - May 15**  
Community Comment Period

**June 5**  
Present revised Annual Plan to Audit Committee

**June 7**  
Final Annual Plan Draft sent to Board of Trustees

**June 12**  
Board of Trustees votes on approval FY 18-19 Annual Plan

**July 1**  
FY17-18 begins and final Annual Plan is posted on Meta
Draft FY18-19 plan: Approach

- **“Year 0” for 2030 strategic direction**
  - We are preparing the organization to make progress against the strategic direction
  - We are developing a 3 to 5 year, medium-term strategic plan

- **Expanded planning frameworks**
  - In FY17-18, we introduced Cross-Departmental Programs
  - In FY18-19, all Programs require definition in terms of resources, outputs, and outcomes

- **Organized around 3 goals**
Priorities
Goal 1: Knowledge Equity
Grow new contributors and content
Goal 2: Knowledge as a Service
Increase reach and audiences
Goal 3: Foundational Strength
Evolve our systems and structures
Programs
(new & incremental)
<table>
<thead>
<tr>
<th>Evolve systems and structures</th>
<th>New content and contributors</th>
<th>Increase reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Address Infrastructure Gaps</td>
<td>- CDP: Community Health</td>
<td>- SEO</td>
</tr>
<tr>
<td>- CDP: Platform Evolution</td>
<td>- Better use of data</td>
<td></td>
</tr>
<tr>
<td>- Reliability Performance, and</td>
<td>- New content from new</td>
<td></td>
</tr>
<tr>
<td>Maint.</td>
<td>contributors</td>
<td></td>
</tr>
<tr>
<td>- Wikidata</td>
<td>- Public Policy/ Strategic</td>
<td></td>
</tr>
<tr>
<td>- CDP: Privacy, Security and</td>
<td>Initiatives</td>
<td></td>
</tr>
<tr>
<td>Data Mgmt</td>
<td>- Scoring Platform</td>
<td></td>
</tr>
<tr>
<td>- Bus Ops Improvement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- CE Strategy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Development &amp; Leadership</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Deployment Pipeline</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year 0-A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Code Health</td>
<td>- Resourcing Communities</td>
<td></td>
</tr>
<tr>
<td>- Build Tech Community*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Legal Fellows* (increase in</td>
<td></td>
<td></td>
</tr>
<tr>
<td>pay for first time in years)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year 0-B with new HC in plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Knowledge Integrity</td>
<td></td>
<td>- CDP: New Readers</td>
</tr>
<tr>
<td>- Movement organizer</td>
<td></td>
<td>- Every human</td>
</tr>
<tr>
<td>- CE Services Infrastructure</td>
<td></td>
<td>- Communications 2024</td>
</tr>
<tr>
<td>- Community Wishlist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Smart Tools for Better Data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Developer Productivity</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year 0-B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Address Knowledge Gaps</td>
<td>- Partnerships for Global</td>
<td></td>
</tr>
<tr>
<td>- Onboarding new Devs</td>
<td>Reach</td>
<td></td>
</tr>
<tr>
<td>- Community Collab in Product</td>
<td>- Wikimedia Brand and Identity</td>
<td></td>
</tr>
<tr>
<td>Dev</td>
<td>- Content and Branding</td>
<td></td>
</tr>
<tr>
<td>- Smart Tools for better</td>
<td></td>
<td></td>
</tr>
<tr>
<td>data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year 1+</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Programs (current & core)
Currently resourced

Evolve systems & structures
- Community grants
- Improving Trust & Safety
- Future working environments
- Defense of Foundation and community
- Global Embrace
- Modern event platform
- PHP7 migration

New content and contributors
- GLOW/Project Tiger
- Voices under threat

Increase reach
- Institutional & professional outreach & partnerships
- Infrastructure evolution
- Community finance

Other Programs
- Learning Days, Events, L&E Communications
- Movement Learning and Evaluation
- Community Program Capacity
- International Developer Events
- Endowment contribution
Core service support

- Environmental Sustainability
- Diversity and Inclusion

- AffCom & Affiliate Partnerships
- Trust and Safety Investigations
- Community Committee and Functionary support

- Online Fundraising
- Fundraising Operations
- Foundations, Major Gifts, and Endowment

- Office IT and A/V
- Risk Management
- Accounting Operations
- Financial Management & Planning

- Compliance with Law and Policy
- Privacy and Security
- Contracts
- Content and Branding
- Board of Trustees support
- Employment Law
- Governance and Grantmaking
- General Legal Support
Metrics & milestones
<table>
<thead>
<tr>
<th>Evolve our systems and structures</th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Services served out of &gt;1 data center</td>
<td>95%</td>
</tr>
<tr>
<td>Services adopting modernized metrics</td>
<td>+20%</td>
</tr>
<tr>
<td>Overall staff engagement</td>
<td>+3%</td>
</tr>
<tr>
<td>Centralized logging of page view services</td>
<td>100%</td>
</tr>
<tr>
<td>Converged MediaWiki with our Node.js services</td>
<td>Milestone</td>
</tr>
<tr>
<td>Wikidata usage</td>
<td>+15%</td>
</tr>
<tr>
<td>Grow Endowment</td>
<td>+$5M</td>
</tr>
<tr>
<td>Able to run product experiments twice monthly</td>
<td>2x per month</td>
</tr>
<tr>
<td>Grow new contributors and content</td>
<td>Target</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Administrators who report having the skills and tools to intervene in cases of harassment</td>
<td>+25%</td>
</tr>
<tr>
<td>New contributor retention in target languages</td>
<td>+10%</td>
</tr>
<tr>
<td>Number of edits on mobile increases in target languages</td>
<td>+20%</td>
</tr>
<tr>
<td>Collect baseline data to measure diversity in contributor demographics</td>
<td>Milestone</td>
</tr>
<tr>
<td>Content growth in target languages</td>
<td>+10%</td>
</tr>
<tr>
<td>Article section recommendation technology</td>
<td>Available in 10 languages</td>
</tr>
<tr>
<td>Artificial intelligence technology providing edit and article quality</td>
<td>Available in 5 languages</td>
</tr>
</tbody>
</table>
### Increase our reach and audiences

<table>
<thead>
<tr>
<th></th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global traffic increases</td>
<td>+1 - 10%</td>
</tr>
<tr>
<td>Wikipedia awareness in target regions</td>
<td>+15%</td>
</tr>
<tr>
<td>Wikipedia is meaningful to women</td>
<td>1 billion</td>
</tr>
<tr>
<td>Users in underrepresented regions can directly access Wikipedia through mobile provider and offline partnerships</td>
<td>1 million</td>
</tr>
</tbody>
</table>
FY 18-19 Revenue Target

- Overall targeted revenue growth of 21.4%
- 20% increase in fundraising target
- Includes $1M in interest income

*Normalized to conform to FY17-18
Program Investment

FY16-17 Actual: $69.1M
FY17-18 Projection: $77.2M
FY18-19 Budget Draft: $92.1M

- $14M
- $0.2M
+$1.2M
+$1.2M
84
Investing in our goals

<table>
<thead>
<tr>
<th>Category</th>
<th>Budget</th>
<th>Staff Change</th>
<th>Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evolve Systems and Structure</td>
<td>$24M</td>
<td>+13 new staff</td>
<td>- 77% ($71M) of the proposed FY17-18 budget is programmatic</td>
</tr>
<tr>
<td>Grow New Content and Contributors</td>
<td>$18.6M</td>
<td>+8 new staff</td>
<td>- 51% ($47.4M) is allocated to the top organizational goals</td>
</tr>
<tr>
<td>Increase Reach</td>
<td>$4.7M</td>
<td>+6 new staff</td>
<td>- 73% of new staff (27 of the 37)</td>
</tr>
<tr>
<td>Opportunity Fund</td>
<td>$1.5M</td>
<td></td>
<td>- $1.5M Opportunity Fund gives us the ability to fund new programs</td>
</tr>
</tbody>
</table>
# Consolidated Budget: Program and Non-Program Expenses

## Income Statement

<table>
<thead>
<tr>
<th>Revenue</th>
<th>FY17-18 Budget</th>
<th>FY18-19 Budget draft</th>
<th>Change ($)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraising &amp; Other income</td>
<td>76,800</td>
<td>93,115</td>
<td>16,315</td>
<td>21%</td>
</tr>
</tbody>
</table>

## Annual Operating Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>FY17-18 Budget</th>
<th>FY18-19 Budget draft</th>
<th>Change ($)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staffing</td>
<td>40,032</td>
<td>49,350</td>
<td>9,318</td>
<td>23%</td>
</tr>
<tr>
<td>Data Center Expenses[1]</td>
<td>4,465</td>
<td>4,676</td>
<td>211</td>
<td>5%</td>
</tr>
<tr>
<td>Donation Processing Fees</td>
<td>3,229</td>
<td>4,048</td>
<td>819</td>
<td>25%</td>
</tr>
<tr>
<td>Grants</td>
<td>7,060</td>
<td>7,628</td>
<td>568</td>
<td>8%</td>
</tr>
<tr>
<td>Endowment Contribution</td>
<td>5,000</td>
<td>5,000</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Outside Contract Services</td>
<td>4,773</td>
<td>6,113</td>
<td>1,340</td>
<td>28%</td>
</tr>
<tr>
<td>Legal Fees</td>
<td>1,922</td>
<td>1,698</td>
<td>374</td>
<td>20%</td>
</tr>
<tr>
<td>Travel &amp; Conferences</td>
<td>2,723</td>
<td>3,364</td>
<td>641</td>
<td>31%</td>
</tr>
<tr>
<td>Other expenses [2]</td>
<td>7,577</td>
<td>7,546</td>
<td>0</td>
<td>-4%</td>
</tr>
<tr>
<td>Opportunity Fund [3]</td>
<td></td>
<td>1,500</td>
<td></td>
<td>-%</td>
</tr>
<tr>
<td>Movement Strategy</td>
<td>1,124</td>
<td>1,124</td>
<td>0</td>
<td>-%</td>
</tr>
</tbody>
</table>

## Total Annual Operating Expenses

| Total Annual Operating Expenses | 76,800 | 92,144 |

## Funds Available for a Specific Purpose[4]

<table>
<thead>
<tr>
<th>Category</th>
<th>FY17-18 Budget</th>
<th>FY18-19 Budget draft</th>
<th>Change ($)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Movement Strategy</td>
<td>483</td>
<td>500</td>
<td>17</td>
<td>4%</td>
</tr>
<tr>
<td>Brand Strategy</td>
<td>860</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Move</td>
<td>697</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Total Funds Available for a Specific Purpose

| Total Funds Available for a Specific Purpose | 2,000 |

## Total Expenses with Funds Available for a Specific Purpose

| Total Expenses with Funds Available for a Specific Purpose | 78,800 | 92,144 | 13,344 | 17% |

---

[1] Capital Expenses are budgeted according to GAAP
[2] Other expenses include: Facilities, Wikidata, Insurance, FF&E, All Hands, Recruiting, Property Taxes, etc.
[3] In FY18-19 we are planning for continued growth and planning to create a 3-5 year plan to achieve Wikimedia 2030. We know that we will need to respond with agility throughout the year as we grow and develop our plan. To do so, we are setting aside an unallocated “Opportunity Fund”. This fund will allow us to fund projects when they are ready, take advantage of opportunities as they arise, pool uncertainty, and tweak our growth trajectory throughout the year.
[4] These expenses are funded from our surplus for specific and non-recurring investments
## By priority area

<table>
<thead>
<tr>
<th></th>
<th>Original Submission</th>
<th>Meta draft</th>
<th>Change ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
<td>%</td>
<td>$</td>
</tr>
<tr>
<td>Evolve systems and structure</td>
<td>26.72M</td>
<td>27%</td>
<td>24.04M</td>
</tr>
<tr>
<td>Grow new content and contributors</td>
<td>20.69M</td>
<td>21%</td>
<td>18.61M</td>
</tr>
<tr>
<td>Increase reach and audiences</td>
<td>4.3M</td>
<td>4%</td>
<td>4.7M</td>
</tr>
<tr>
<td>Other: Program*</td>
<td>27.94M</td>
<td>28%</td>
<td>26.32M</td>
</tr>
<tr>
<td>Other: Non-program*</td>
<td>20.21M</td>
<td>20%</td>
<td>18.47M</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>99.86M</strong></td>
<td><strong>100%</strong></td>
<td><strong>92.14M</strong></td>
</tr>
</tbody>
</table>

*Other: Program* includes Core and currently resourced programs not included within the 3 goals.

*Other: Non-program* includes budgeted Core non-program expense not captured within Evolve Systems and Structures.
<table>
<thead>
<tr>
<th>Department</th>
<th>Original Submission</th>
<th>Meta draft</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advancement</strong></td>
<td>$15.11M</td>
<td>15.1%</td>
<td>$14.8M</td>
</tr>
<tr>
<td></td>
<td>($0.31M)</td>
<td>-2.0%</td>
<td></td>
</tr>
<tr>
<td><strong>Audiences</strong></td>
<td>$19.95M</td>
<td>20.0%</td>
<td>$17.46M</td>
</tr>
<tr>
<td></td>
<td>($2.49M)</td>
<td>-12.5%</td>
<td></td>
</tr>
<tr>
<td><strong>Community Engagement</strong></td>
<td>$17.15M</td>
<td>17.2%</td>
<td>$15.17M</td>
</tr>
<tr>
<td></td>
<td>($1.98M)</td>
<td>-11.6%</td>
<td></td>
</tr>
<tr>
<td><strong>Communications</strong></td>
<td>$3.22M</td>
<td>3.2%</td>
<td>$2.63M</td>
</tr>
<tr>
<td></td>
<td>($0.58M)</td>
<td>-18.1%</td>
<td></td>
</tr>
<tr>
<td><strong>Finance &amp; Administration</strong></td>
<td>$7.71M</td>
<td>7.7%</td>
<td>$7.71M</td>
</tr>
<tr>
<td></td>
<td>$0M</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td><strong>Office of the ED</strong></td>
<td>$2.19M</td>
<td>2.2%</td>
<td>$2.2M</td>
</tr>
<tr>
<td></td>
<td>$.01M</td>
<td>0.3%</td>
<td></td>
</tr>
<tr>
<td><strong>Legal</strong></td>
<td>$5.37M</td>
<td>5.4%</td>
<td>$4.73M</td>
</tr>
<tr>
<td></td>
<td>($0.64M)</td>
<td>-12.0%</td>
<td></td>
</tr>
<tr>
<td><strong>Talent and Culture</strong></td>
<td>$3.53M</td>
<td>3.5%</td>
<td>$3.2M</td>
</tr>
<tr>
<td></td>
<td>($0.33M)</td>
<td>-9.3%</td>
<td></td>
</tr>
<tr>
<td><strong>Technology</strong></td>
<td>$24.3M</td>
<td>24.3%</td>
<td>$21.45M</td>
</tr>
<tr>
<td></td>
<td>($2.85M)</td>
<td>-11.7%</td>
<td></td>
</tr>
<tr>
<td><strong>Centralized travel budgets</strong></td>
<td>$1.34M</td>
<td>1.3%</td>
<td>$1.28M</td>
</tr>
<tr>
<td></td>
<td>($0.06M)</td>
<td>-0.4%</td>
<td></td>
</tr>
<tr>
<td><strong>Opportunity Fund</strong></td>
<td>N/A</td>
<td>-</td>
<td>$1.5M</td>
</tr>
<tr>
<td></td>
<td>$1.5M</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>99.86M</td>
<td>100.0%</td>
<td>92.14M</td>
</tr>
<tr>
<td></td>
<td>(7.72M)</td>
<td>-7.7%</td>
<td></td>
</tr>
</tbody>
</table>
Planned recruiting
Current hiring pace vs. budget draft

- Hiring ramp from prior year projected forward
- Hiring ramp in current draft

+70 HC

+37 HC

April 2018  July 2018  October 2018  January 2019  April 2019
Barriers, bottlenecks

- Lack of openness to entry level & quick hires hinder D&I efforts
- Process bottlenecks
  - HMs time in developing JDs and interview teams
  - HM slowness in sticking to plan as budgeted
  - Interview scheduling & time zones, especially with big interview teams
  - Visibility into hiring progress, cycle times, and inconsistent volume
- Resourcing and hiring pipelines to support hiring plan
- No holistic monitoring for progress assessment and corrective action
Diversity & inclusion

Continue to build our practices around Diversity and Inclusion:

- Representation in screening
- Validity of selection
- Consistency & fairness
- Conversion guidelines
- Different levels of candidate pools sourcing
Making it happen

- Setting targets for cycles and milestones
- Tools to improve hiring manager accountability
- Prepare for and open jobs early, including req # and JDs
- Promote roles with internal applicants and staff referrals
- Build in flexibility to adjust hiring to our needs and opportunities
- Standardize JDs and implement batch hiring
- Revisiting candidate pools, streamlining interview teams

If all hires take even one quarter longer than planned, the impact is ≈$2M
Evolving our platform
What does Knowledge as a service mean for the platform?

All of our data and content should be available via APIs
What does Knowledge equity mean for the platform?

Our experiences should make the full functionality of our software available across all platforms, devices, languages, geographies and abilities.
A brief history of the platform
“Before mobile” 2001-2011

Desktop Browsers

Skins
Templates
Extensions
Gadgets

MediaWiki

Core
Parser
“Mobile” 2011

Desktop Browsers

Skins
Templates
Extensions
Gadgets

Mobile Browsers

Mobile Frontend

MediaWiki

Core
Parser
“Visual Editor” 2012

- Desktop Browsers
- MediaWiki
- Skins
- Templates
- Extensions
- Gadgets
- Mobile Browsers
- Visual Editor
- Parsoid
- RESTBase
- Frontend
- Parser
- Mobile Browsers
- Desktop Browsers
- MediaWiki
- Visual Editor
- Parsoid
- RESTBase
- Frontend
- Parser
- "Visual Editor" 2012
“Apps” 2013-present

- Desktop Browsers
- Mobile Browsers
- Mobile Content Service
- Visual Editor
- iPad App
- Android App
- Parsoid
- RESTBase
- MediaWiki
- Skins
- Templates
- Extensions
- Gadgets
- Mobile Frontend
- Core
- Parser

Graphical representation of the components and their relationships.
...and there's more

ORES
Memcached
Cirrus
Swift
Commons
Kafka
结构化讨论
Redis
Event Bus
Varnish
 PCS
Page View API
API
WikiData
内容
Content Translation
Wikibase
MCR
Thumbor
Cassandra
Event Bus
MCR
Content Translation
Wikibase
Swift
Varnish
Page View API
API
WikiData
“Just in time” architecture

Emergent vs designed
“Just in time” architecture

- Fragmentation
- Maintenance burden
- Developer impedance
- Technical debt
- Poor documentation
Digging ourselves out of a hole and getting ready to support the strategy
No judgement zone

- The state of our technology stack is not because of poor engineering
- Staff and volunteers have been doing the best they can with the time and resources they have
- Teams have been under resourced
- Teams have been working in isolation
- We have been building around issues instead of fixing them
- None of the above is unusual
How?

- Communication
- Planning
- Long term infrastructure investments
Where?

- Developer Summit
- Audiences Technology Working Group
- Platform Evolution Program
- TechCom
- TechConf
Platform Evolution
Program goal
Empower the Wikimedia Movement to accomplish its goals of Knowledge Equity and Knowledge as a Service by evolving and investing in our technology stack to improve its flexibility, maintainability, and sustainability
Outcome 1

All features, all platforms, all devices, all form factors

- Responsive design for web
- APIs for other platforms: apps, voice assistants, etc...
Outcome 2

Easy to scale, develop, maintain and test

“Foundation” of Outcome 1

- Enables machine learning, search and analytics
- Enables new capabilities
- Quicker to build features
- Efficient use of resources
Outcome 3

Document it all

- Support 3rd party API consumers
- Prevent code duplication
- Improve productivity and ease onboarding
Year 0 of a multi-year plan
Outcome 1

Document our needs and infrastructure; develop the plan

- Gather needs and requirements from stakeholders
- Audit our infrastructure and document it
- Develop the plan for evolving our technology stack
Outcome 2

Establish new architecture

- Develop new API infrastructure for future experiences
- Begin Parser unification
- Begin rearchitecting MediaWiki for flexibility and scaling
- Rearchitect other services to better integrate with MediaWiki
Outcome 3

Establish centralized documentation portal

- Design and develop a new centralized documentation portal
- Resource documentation development and design
- Publish architecture guide, evolution plan, how-tos and new API reference on portal
Organizing for impact
The Core Platform team

- Combining the Mediawiki and Services Platform Tech teams to build a converged platform team to be the focus of the CDP
- Brings together some of the most senior technologists of our community.
- Adding 6 further FTEs
- This team will begin the hard work of re-architecting our technology stack into a more sustainable and flexible platform,
- The Core Platform team will do incredibly important work to sustain our software stack day in day out while also looking into the future and guiding the reengineering of our platform to support the mission for the years ahead.
And a broad partnership

WMF Audiences
  Readers
  • 2.25 Engineers plus product and design support
  • Improving mobile interface for contributors
  • Documenting workflows to be turned into APIs
  • API development

Parsing
  • 2.5 Engineers
  • Prototyping and testing parser unification solutions
  • Beginning parser unification

WMDE
  • Architectural support throughout project; Additional resourcing planned for 2019.
Wikidata
Launched in 2012 to manage structured data across Wikimedia projects, Wikidata is swiftly becoming the general semantic framework for the entire web.
Critical mass

46 MILLION ITEMS

410 MILLION STATEMENTS

900 MILLION REFERENCES

2017
Let’s talk about the road ahead
Strategic priorities

Determine use cases
Develop product roadmap to support the use cases
Ecosystem development for the use cases
Road to sustainability
By way of an analogy

MW supports many sites, including a very long tail. Gets code and support from WMF and community. It is sustained through Wikipedia donations.
Wikibase Strategy

WB supports Wikidata, is the foundation for our linked knowledge strategy, will serve multiple partner institutions, and will be sustained through large donations.
Wikidata Strategy?

Is Wikipedia the primary beneficiary of Wikidata? Or is it partner institutions or others? This is the key question that we need to answer.
Some Options

1. Wikipedia
2. Institutional users
3. Building APIs for others
4. Offering services to others on top of the APIs
One potential plan
Working with institutions as fundamental allies
These domains support the mission

- Cultural Heritage
- Libraries
- Scientific research
- Others...

Linking the sum of all knowledge

- Wikibase
- Wikidata
- Community
Wikidata for Libraries and Scholarship
“There’s a library-shaped hole in the internet”

— David Weinberger (Boston Globe)
The library-shaped hole in the internet

The internet makes research and access to sources more dynamic and universal, but libraries, researchers, and public users struggle with:

**Lack of discoverability**
Discovery is fragmented throughout the library ecosystem: web-scale solutions are driven by black-box algorithms and closed, access-restricted data and sources.

**Disconnected knowledge**
Stable identifiers and authority data increase connectedness of scholarship, but existing datasets and approaches miss much of the diversity of global knowledge.

**Proprietary control**
Scholarship is contained within walled gardens run by for-profit companies and aggregators, whose financial incentives keep the data closed rather than shared.
Imagine...
an open, internet-scale discovery infrastructure for libraries and scholarship
Wikimedia is positioned to become the backbone of the trustable web

The internet needs an open, auditable framework for citing and tracking the provenance of information — from first publication to reuse.

Wikipedians have developed practices for finding, vetting, and sharing reliable sources across cultures and languages — we want to turn this into infrastructure for the entire web.

We need to collaborate with libraries, OA advocates, and expert communities who have shaped the bibliographic domain for decades.
Toward a web-scale discovery infrastructure

Ecosystem:
Local data, global context

Data:
The sum of all citations

Access:
Citations as gateway

Impact:
Exploring global scholarship
Imagine a world in which scientific knowledge is shared in the spirit of Freedom, Collaboration, and Openness.
Wikipedia is already shaping science and society.

As a living historical artifact, Wikipedia is a reflection of the society that creates it. It is a way for humans to explore inward.

Wikipedia is a lens through which we discover who we are, seek knowledge to make informed decisions, and create our legacy for future generations.
Five elements toward this vision

- A federated network of knowledge bases
- An open repository for scientific data
- The sum of all citations
- The portal to the provenance of all scholarly knowledge
- The sum of open access literature
A movement for open science

Transforming scientific research is a long-term effort that will require larger changes and many partners.

It will require a movement of fellow travelers who work together and each bring their strengths to make this vision a reality.

Wikimedia hopes to contribute to this transformation by making it possible to do scientific research the wiki way.
Wikidata for Cultural Heritage
Tying together disconnected heritage
A fractured landscape

Decades of digitization by memory institutions have created a vast cultural corpus online. But this expert-curated knowledge struggles to reach broader audiences due to:

**Lack of openness:**
Digital collections are often locked behind restrictive access policies, or held in subscription-based platforms, limiting their reach and reusability.

**Lack of reach and cohesion:**
Collections tend to live in institutional or vendor silos. Even when aggregated (à la DPLA, Europeana), impact is limited by painful workflows, non-interoperable metadata, and “portal”-centric strategies that struggle to engage with how media is discovered and consumed today.

**Missing representation:**
Accessible digital collections tend to reflect well-funded, western institutions. This leaves representation gaps across cultures and languages not represented in those collections, preventing collective action to share marginalized knowledge and fill gaps.
Imagine:
All the world’s libraries, museums, and archives connected in a single, global platform
Wikimedia is positioned to be the loom that weaves heritage collections into the web.

Wikimedia has been facilitating open practices with GLAMs in a global context for close to a decade.

There is an accelerating shift to open access in the cultural heritage space, positioning digital collections for impact.

Wikidata + Commons offer a practical, global-scale linked data/media infrastructure to connect heritage content worldwide.
Toward a linked heritage ecosystem

Content: A global platform for digital heritage

Data: A universal framework for describing and linking collections

Ecosystem: A federated network of practice

Impact: Exploring shared cultural memory
All viable options must have a path to sustainability
Next Steps

1. Work with WMDE on resourcing strategic development (April 2018)
   a. Product Management
   b. Wikibase as a separate product
   c. Sustainability models
2. Continue to integrate Wikidata with Product and Technology roadmaps (ongoing)
   a. Platform Evolution
   b. Integration with Wikipedias and other projects
3. Work with potential partners on funding opportunities (ongoing)
Editor retention
Introduction
Contributors | the Status Quo wasn’t working

➔ Editor counts were flat, new editor retention was low
➔ English Wikipedia community had hostile relationship with the Foundation
➔ Lack of response to fundamental changes in internet platforms
➔ Product verticals weren’t working together
Contributors | Where to Focus

**strategy**

Readiness to implement Movement Strategy in 2018

- Set clear goals and timelines
- Plan across Audiences, not silos

**community**

Re-engage community members and customers

- Talk more openly with contributors about plans and goals
- Reboot needlessly controversial projects
- Engage with many communities, not just English

**skills upgrade**

Improve competencies

- Product management
- Mobile development
- General management
- Design

**responsibilities**

Clarify lines of responsibility

- Fix bespoke organization structures
Focus on new contributors and content, reach and data

Focus on data & new contributors

Mobile platforms, SEO

New form factors

New content

Mobile platforms, performance, backward compatibility

Editor onboarding (strategic reset) and temporary refocus on Maps
Contributors | Current Status

Strategy
- Strategy set by Team
  (for the first time)
- Reconfiguration and refocus of entire Audiences teams
- Web, iOS, Android Editing
- Content Translation
- Editing
- Collaboration

Community
- Re-engage community members and customers
  ➔ Talk more openly with contributors about plans and goals
  ➔ Reboot needlessly controversial projects
  ➔ Engage with many communities, not just English

Skills Upgrade

Responsibilities
Community Engagement Principles

→ Product managers will engage directly and sincerely with users, especially at difficult moments

→ Build credibility by being honest, keeping promises, and releasing products the community needs

→ Learn from “rollout strategy” mistakes, and engage actively with contributors from the concept/wireframe stage

→ Engage with all communities, not just English Wikipedia
Contributors | Current Status

**strategy**

Strategy set by Team
(for the first time)

Reconfiguration and refocus of entire Audiences teams

Web, iOS, Android Editing

Content Translation

Editing

Collaboration

**community**

Re-engage community members and customers

➔ Talk more openly with contributors about plans and goals

➔ Reboot needlessly controversial projects

➔ Engage with many communities, not just English

**skills upgrade**

Management transitions

➔ Wes Moran

➔ Trevor Pascal (formerly Head of Contributors)

➔ Lindsey Anne Frankenfield (Dir. Eng)

Promoted & new staff

➔ Toby Negrin, interim VP => CPO Nov 2017

➔ Danny Horn, Dir. of Product

➔ Ryan Kaldari, Contrib. Eng.

➔ Margeigh Novotny, Sr. Dir. Product Design

Strategy

Reassigned

➔ James Forrester

**responsibilities**
# Contributors | Current Status

<table>
<thead>
<tr>
<th>strategy</th>
<th>community</th>
<th>skills upgrade</th>
<th>responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategy set by Team (for the first time)</td>
<td>Re-engage community members and customers</td>
<td>Management transitions</td>
<td>Standardized org structure into matrixed feature teams</td>
</tr>
<tr>
<td>Reconfiguration and refocus of entire Audiences teams</td>
<td>Talk more openly with contributors about plans and goals</td>
<td>→ Wes Moran</td>
<td>Staffed unfilled design functions</td>
</tr>
<tr>
<td>Web, iOS, Android Editing</td>
<td>Reboot needlessly controversial projects</td>
<td>→ Trevor Pascal</td>
<td>Created <strong>Language Team</strong>: focus is lang infrastructure, translation and new content</td>
</tr>
<tr>
<td>Content Translation</td>
<td>Engage with many communities, not just English</td>
<td>→ Lindsey Anne Frankenfield</td>
<td>Added technical program management function</td>
</tr>
<tr>
<td>Editing</td>
<td></td>
<td>Promoted &amp; new staff</td>
<td>Consolidated <strong>Analysts</strong> into new team with management support</td>
</tr>
<tr>
<td>Collaboration</td>
<td></td>
<td>→ Toby Negrin, interim VP</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>→ Toby Negrin, CPO Nov 2017</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>→ Danny Horn, Dir. of Product</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>→ Ryan Kaldari, Contrib. Eng.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>→ Margeigh Novotny, Sr. Dir.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reassigned</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>→ James Forrester</td>
<td></td>
</tr>
</tbody>
</table>

|                                             |                                               | Created **Language Team**: focus is lang infrastructure, translation and new content | Added technical program management function |
|                                             |                                               |                                             | Consolidated **Analysts** into new team with management support |
Strategy set by Team (for the first time)

Reconfiguration and refoce of entire Audiences teams

**Web, iOS, Android Editing**

**Content Translation**

**Editing**

**Collaboration**

Re-engage community members and customers

- Talk more openly with contributors about plans and goals
- Reboot needlessly controversial projects
- Engage with many communities, not just English

Management transitions

- Wes Moran
- Trevor Pascal
- Lindsey Anne Frankenfield

Promoted/new Staff

- Toby Negrin, interim VP
- Toby Negrin, CPO Nov 2017
- Danny Horn, Dir. of Product
- Margeigh Novotny, Sr. Dir.

Reassigned

- James Forrester

Standardized org structure into matrixed feature teams

Staffed unfilled design functions

Created **Language Team**: focus is lang infrastructure, translation and new content

Added technical program management function

Consolidated **Analysts** into new team with management support
Research
The New Editors Study | 2018-19 AP goals

➔ The Product team has made a commitment to using qualitative and quantitative research to prioritize product programs and community interventions

➔ The New Editors and New Readers research have been central to the programs proposed in the Audiences 2018-19 Annual Plan
Our goal? To learn more about the experiences of editors that are just learning how to contribute

➔ What are their motivations and behaviors?
➔ How do the project’s technology and community shape their impressions and experience as new contributors?
What drives contribution?

➔ People want to make contributions that are useful to others, and be recognized for providing this benefit.

➔ People prioritize contribution activities which best serve their needs, and will quickly drop those that do not.

➔ People become heavily invested in online contribution when they receive something to advance their offline work, professional or personal, and/or identities.
New editors’ greatest challenges are not technological, but conceptual. They struggle to learn Wikipedia’s policies and how to shape content "the Wikipedia way".

The complexity and separation of how Wikipedia is made, and the community behind it, make it difficult to convert readers to editors and new editors into experienced editors.

Editing processes, and the mechanisms that support them, are not intuitive or discoverable, making it difficult for new editors to learn and progress.

Many editors are less inclined to edit smaller Wikipedias because the content gap that needs to be filled is too large. This cycle prevents medium-sized wiki from reaching a critical mass value.
Key indicators | 2018-19 AP goals

➔ The Product team has made a commitment to using qualitative and quantitative research to prioritize product programs and community interventions.

➔ Our contributors metrics (editor retention) have been flat for several years. We are committed to growth in these areas.
Retention Rate
Active Editors per Month

- global active editors (5+ content edits)
Editors per Month

![Graph showing the number of global editors (1+ content edits) per month from January 2015 to January 2018. The graph indicates fluctuations in editor activity with a general trend of relatively stable numbers, with some minor peaks and troughs.]
Registrations and New Editors per Month

![Graph showing registrations and new editors per month from Jan 2015 to Jan 2018. The graph displays two lines: one for global registrations and one for global new editors (1+ edits). The registration line shows a peak in Jan 2016, while the new editor line remains relatively flat.]
## Connecting research with action | 2018-19 AP goals

<table>
<thead>
<tr>
<th>Source</th>
<th>Finding</th>
<th>Intervention</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Editors Research</td>
<td>New editors hey struggle to learn Wikipedia’s policies and how to shape content &quot;the Wikipedia way&quot;.</td>
<td>Human to human help</td>
</tr>
<tr>
<td></td>
<td>The complexity and separation of how Wikipedia is made...</td>
<td>Articles for Creation</td>
</tr>
<tr>
<td></td>
<td>The content gap that needs to be filled is too large</td>
<td>Fix talk pages</td>
</tr>
<tr>
<td>Quantitative Research (internal metrics + industry data)</td>
<td>The internet is increasingly a mobile experience</td>
<td>Content Translation v2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Responsive Vector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>WYSIWYG Editing</td>
</tr>
</tbody>
</table>
Human to Human help

- Existing successful projects: *The Teahouse* on English WP and *Forum des Nouveaux* on French WP.

- This year, work with Czech and Korean WP to set up similar projects

- Goal: build model for successful human-to-human support for all languages

**Metric:** Editor Retention  |  **Goal:** 10% lift in retention in target wikis
Articles for Creation

- ACTRIAL research showed no negative impact on user retention
- Backlog shifting from New Page Patrol to Articles for Creation
- Building a tool with AfC to help reviewers focus on promising new pages and editors
- Goal: help new editors to publish good-quality content

Metric: Editor Retention | Goal: 10% lift in retention in target wikis
“Fix talk pages”

- The Flow discussion system will not be accepted on the biggest wikis
- This year: Large-scale reboot consultation with all wikis
- Come to consensus about problems that need to be solved
- Goal: Kick off a public design and development process to fix talk pages
Contributors using the Content Translation tool have translated more than 300,000 articles in the last three years.

Currently working on Content Translation v2:

- New version uses VisualEditor
- Helps users translate templates
- Users can copy & paste rich content
- More guidance to newcomers

**Metric:** New Content  |  **Goal:** 10% increase in content in target wikis
Responsive Vector

- Establish baseline level of mobile support
- “Get in the game”
- Lets experienced editors start to work on mobile devices
- WYSIWYG editing is the next step

Metric: New Content  |  Goal: 10% lift in mobile edits on target wikis
NEW CONTENT / Mobile Editing / WYSIWYG Editing

Metric: New Content | Goal: 10% lift in mobile edits on target wikis
Community health
Tool development
Tools available now

- Better control for users
  - Mute features, better notifications and email control

- Better tools for admins
  - Making case evaluation easier with the Interaction Timeline

- Improving automatic detection
  - Filtering abuse in better ways through Abuse Filter and AntiSpoof. Performance of these filters has improved by approximately \( \frac{2}{3} \) since this work has been implemented.
Tools in the pipeline

- Improving blocking tools
- Better ways to report harassment
- Dashboard system for wiki administrators to help them manage current investigations and disciplinary actions.
Policy enforcement and growth
Current work

- Evaluating processes:
  - Survey and analysis of Administrators’ noticeboard

- Supporting policy growth
  - Assisting new Technical Spaces Code of Conduct Committee
  - Working with AffCom on mediation support
Future plans

- Making a Community Health Metrics Kit to allow both staff and community better insights into quality of processes and policy
- Working with Wikidata on policy growth
Research

- **Moderation and dispute resolution**
  - Collaborating with Harvard on analyzing dispute resolution processes and policies with a goal of improving our reporting systems and policies

- **Sockpuppet detection**
  - Working with the anti-harassment team to improve automated sock puppet detection models
  - Planning a test in Q4 once model calibration is completed
Direct support
Legal support

- Supporting one large-scale criminal case protecting staff and community members
- Ongoing investigations into long-term harassers, possible legal action
- Advised on global bans of harassing users
Trust & Safety support

- Behavioral investigations:
  - Improved key ca@ KPI by 13.2 percentage points
  - 10 Foundation Global Bans in the last year
  - Implemented withdrawal of checkuser rights from Chinese Wikipedia
  - Issued conduct warnings
- Voices under Threat:
  - Creating a support network and collating resources
Event safety
Event safety

- New “Keeping Events Safe” booklet for events organizers, debuting in Berlin
- Scripts and suggestions for dealing with reports
- Reference grid of problems and solutions
- Helps organizers self-evaluate
Emerging communities
More Wikipedia edits come from the Netherlands than all of Africa

- Oxford Internet Institute
Sum of all knowledge?
“Have you heard of Wikipedia?”
1 in 3 Indians
1 in 4 Nigerians
1 in 5 Iraqis
That’s nearly a billion people in 3 countries
What is awareness? Why does it matter?
Low awareness of Wikipedia is correlated to low usage
Low awareness

Sources: https://meta.wikimedia.org/wiki/Global_Reach/Insights
Low usage

Sources: https://meta.wikimedia.org/wiki/Global_Reach/Insights
We’ve talked about the community-driven awareness efforts. What were the results?
The Iraq ad has more than 5.1 million views

~ 18% of Iraqis
Selection of video comments

English comments:
- Well done and God bless you.
- Well done and good luck.
- Peace be upon you. Thank you ạṣyàṣyl you are a leading company and a bouquet in all what is fun and useful...
- The Library is our culture.

Arabic comments:
- السلام عليكم .. نشكركم انسجامكم، إنتم شركة رائدة ومسايرة في كل ما هو مثير ومفيد...
- كيف اشارك في خدمة الويكيبيديا؟ تحياتي
- السؤال: كيف أشارك في خدمة الويكيبيديا؟ تحياتي

Automatic Translation:
- Automatically Translated
Have heard of Wikipedia

Iraq

19% → 25%

Results based on preliminary phone surveys
Iraq results

32% increase in awareness

Over complete period of awareness efforts
Iraq results

132% increase in pageviews
NIGERIA
The Nigeria ads have more than 17 million views
~ 9% of Nigerians
Selection of press reactions

**Pete Edochie Is As Charming As Ever In This Adorable Wikipedia Ad**

Nollywood veteran, Pete Edochie, has built a reputation for consistently playing the wisest man in the room, but his memorable proverbs have transcended his character, making him a bonafide pop culture icon.

That’s exactly what makes Wikipedia’s ad featuring the actor a stroke of genius. The three-minute skit highlights more than the irrefutably wise Pete Edochie; it’s Pete Edochie himself.

> “And YouTubers, Emmanuella and Mark Angel who show school students the need for Wikipedia.”

**HAVE YOU SEEN EMMANUELLA’S COMEDY SKIT ABOUT WIKIPEDIA?**

**Online Special**

Pete Edochie, Emmanuella star in Wikipedia campaign (VIDEOS INCLUDED)

By Ewure Victoria (Emmanuella) | Published Date: Sep 22, 2017 16:50PM

**EMMANUELLA AND PETE EDOCHIE ARE HELPING WIKIPEDIA PROMOTE READING IN NIGERIA**

Social media shares have been circulating two comedy skits that feature Young Comedian, Emmanuella and Veteran Actor, Pete Edochie to raise awareness of reading through Wikipedia in Nigeria. It’s ironic that in Emmanuella’s video she is the little girl teaching and in the video featuring Pete Edochie he acts as the wise man teaching.
Nigeria

Have heard of Wikipedia

27% → 42%

Results based on preliminary phone surveys
Nigeria results

50% increase in awareness

Over complete period of awareness efforts
Nigeria results

15% of internet users learned about Wikipedia for first time from videos
What’s next for awareness?

- Reach new markets
  - Mexico
  - Brazil
  - Egypt
- Refine measurement definitions and techniques
- Explore what it means to reach every human
Project Tiger/GLOW
A pilot with Google to grow content in Indic languages
Elements of Project Tiger

A editing contest funded by Google focused on 10 Indic languages

Google provided Chromebooks and vouchers for Internet access to 50 volunteers

Goal: Create 2000 articles from a list of the most requested missing content in these languages

Contest runs from March 1 to May 31
Preliminary Results: On track

Google is pleased with the preliminary results and wants to expand the program beyond India.

Over 1000 articles created at the halfway point

What does this represent in Punjabi?

In the month of March 2018, 979 pages were added to Punjabi Wikipedia. 281 of those articles were created as a part of Project Tiger.

Punjabi had 48 active editors in March, 15 of whom were Project Tiger participants.

What does it represent in Tamil?

In the month of March 2018, 2161 pages were added to Tamil Wikipedia. 261 of those articles were created as a part of Project Tiger.

Tamil had 140 active editors in March, 21 of whom were Project Tiger participants.
Endowment
Existing structure
Future funding
Board business
Role, future, challenges
Recruiting
Approvals
Executive session