



Wiki Education

2020–21 Annual Plan

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Looking back: 2019–20

A Year in Review

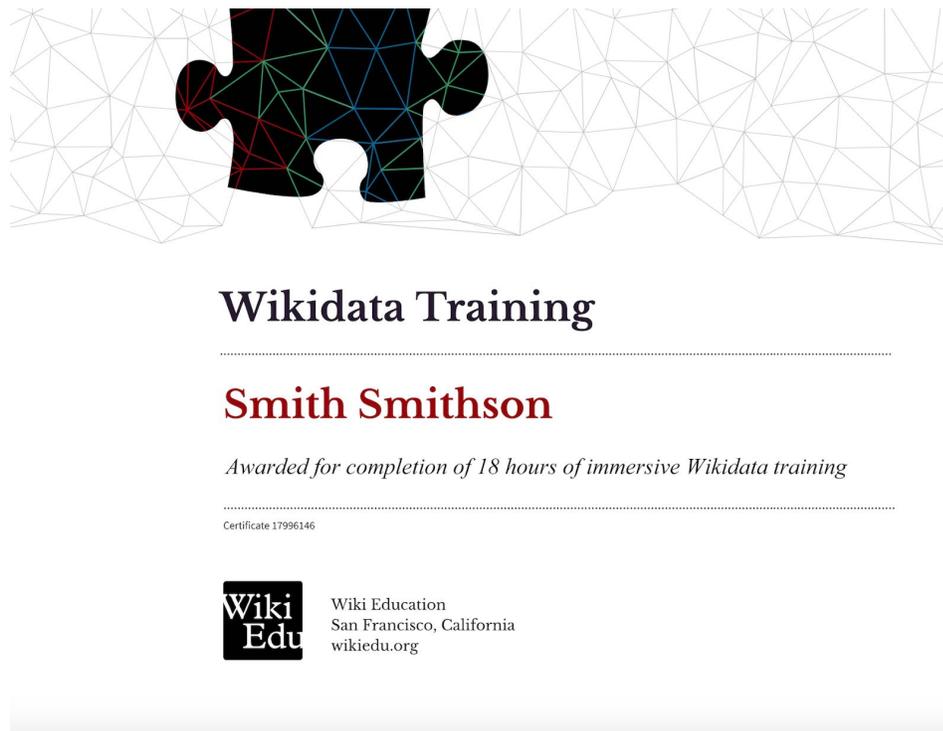
Wiki Education’s fiscal year 2019–20 has been shaped by our efforts to strengthen Wikidata, our long term initiative “Communicating Science”, by improvements to our software platform, and – toward the end of the year – by the severe effects of the COVID-19 pandemic on life and work in the United States, and on our organization.

One of the key focus areas in 2019–20 has been Wikidata, the structured open data repository for facts. The reasons are obvious: given the prevalence of Google Search and the rise of virtual digital assistants like Alexa and Siri, an increasing number of people rely on Wikidata, the database of facts that aims to represent everything in the universe in a way computers can understand. Whenever people look something up on the web or ask Alexa for advice, Wikidata is part of the structured knowledge base that supplies the answer. That’s why, in 2018, Wiki Education added Wikidata as one of the cornerstones of its current strategy.

Preparation of Wikidata training materials had started in early 2019, so that we could offer our first online courses titled “Join the Open Data Movement” and “Elevate Your Collections” at the start of the new fiscal year in July. The online synchronous six-week courses train subject matter experts on Wikidata fundamentals and encourage them to contribute to Wikidata. Participants came from organization like Carnegie Hall, the Smithsonian Libraries, the Art Institute of Chicago, The Texas Archive of the Moving Image, the Detroit Institute of Art, the San Francisco Museum of Modern Art (SFMOMA), the Met, the National Museum of American History, the Yale University Art Gallery, Stanford Libraries, la Biblioteca Nacional de Colombia, the Frick Art Reference Library, and the Center for Research Libraries (CRL). They all learned the technical skills needed to make edits, create items, and query items as well as the underlying concepts required to connect their collections to Wikidata. Most importantly, participants in these courses started thinking about how to use Wikidata as a means to interpret, share, and grow their own data collection.

A good example of the improvements our course participants made on Wikidata is the property “exonerated of”. Until last year, and based on a gap in its data modeling, Wikidata did not include post-conviction data. Which means, if you looked up a person who had been convicted of a crime, but had later been exonerated, only the fact that the person had been convicted would show up. If you had searched Wikidata for Clarence Brandley, who was wrongfully convicted of murder in 1981, you would have never known that Brandley was exonerated nine years later. Capturing this information is possible now due to the knowledge and passion of our course participants for data modeling. By contributing to the structure of Wikidata in such a fundamental way, these course participants are changing the way data exists on Wikidata. We’re looking forward to more of these examples in the years to come.

Figure 1. An example of a Wikidata course certificate



Another area Wiki Education focused on in fiscal year 2019–20 has been the “Communicating Science” initiative. Given the ongoing spread of misinformation through social media and the denial of basic scientific facts, we were proud to continue our work in strengthening the general public’s access to free and trustworthy science-related knowledge. In December, we signed a contract with the American Physical Society (APS), who sponsored one of our Wiki Scientists courses in February 2020. In January, we launched the second iteration of online courses in cooperation with the Society of Family

Planning, aimed at training their members – primarily medical practitioners – how to add scientific information to family planning articles. Over the course of the fiscal year, we encouraged several courses in our Student Program to work on biographies of women scientists as part of our effort to narrow Wikipedia’s gender gap and ensure knowledge equity across fields. We drew heavily on our existing network of instructors in the sciences to recruit new instructors to the program so more students have the chance to improve their ability to communicate scientific knowledge while improving Wikipedia’s content.

In order to increase the visibility of our Communicating Science efforts, staff members presented at the Ecological Society of America and American Meteorology Society conferences, and staffed a booth at those two as well as the Botanical Society of America and American Astronomical Association conferences. We also had presentations accepted at the American Physical Society and Allied Genetics conferences, which ended up being canceled due to the COVID-19 pandemic.

In spring 2020, our Student Program reached a new milestone. For the first time in the history of “Teaching with Wikipedia”, we recorded more than 400 classes from universities throughout the United States to participate in our program in a single term. At the same time, our tech department rolled out significant improvements to our “Dashboard” platform. We provided better step-by-step guidance for students developing their articles and peer reviewing classmates’ articles, and a related set of improvements to make it easier for instructors to evaluate what a student did for each key stage of the assignment. The results of these efforts have been very encouraging: Based on user tests with instructors in Spring 2020, and iterative improvements based on those tests, our Dashboard platform comes much closer to meeting the grading needs of a large portion of instructors participating in our Wikipedia Student Program.

In January, and after an extensive search effort, Wiki Education’s board of directors welcomed two new members: Jon Cawthorne, Dean of the Wayne State University Library System and incoming president of the Association of College & Research Libraries (ACRL), and Meaghan Duff, Owner & Principal of Mercy Education Partners and former Senior Vice President for Partnerships & Strategy at Faculty Guild.

In February, the effects of the global COVID-19 pandemic hit California. In order to keep our Bay Area-based staff healthy, Wiki Education closed its office in the Presidio and moved all its operations online. In order to deal with the new situation, staff created a contingency and a crisis communications plan for each program. We also instituted a weekly COVID-19

briefing aimed at creating a shared understanding of how the pandemic affects our organization. A “Friday virtual social hour” helped staff deal with the psychological effects of the pandemic.

If the COVID-19 pandemic has taught us something in the months since its outbreak, it is how important access to accurate and trustworthy information is. Wikipedia and its volunteers have played an important role in this global pandemic from day one: By providing critical information about the infectious disease, the virus that’s causing it, and the global pandemic that’s currently taking place. However, some relevant aspects needed to be explained better and at greater length. That’s why Wiki Education, in April 2020, invited subject-matter experts with backgrounds in political science, public policy, and journalism to take free, 6-week Wikipedia editing courses in an effort to improve online information about state and regional responses to the COVID-19 pandemic in the United States. At the time of the writing of this report this attempt to serve the general public in the United States during its most severe crisis in decades was still ongoing.

This all has been made possible by last fiscal year’s funders, the excellent work of our board, Wiki Education’s healthy relationship with the community of Wikimedia volunteers, the tremendous dedication of our staff, and the thousands of students, instructors, and subject-matter experts enrolled in our programs.

Programs

In 2019–20, the Programs team focused on maintaining Wiki Education’s impact on Wikipedia while the organization launched its Wikidata program and transitioned the Wikipedia portion of the Scholars & Scientists Program to a for-fee model. In the Wikipedia Student Program, we sought to maintain our impact level year-over-year, with a focus on our Communicating Science initiative. We also supported the Advancement team’s goals by producing Wikipedia courses as they sold them. We are particularly proud of our new line of Wikidata courses, which we launched early in the year and which have had a meaningful impact on both our revenue numbers and Wikidata content this year.

Wikipedia Student Program

Goal: Expand impact of Communicating Science Initiative

In 2019–20, we continued to ensure that our Communicating Science initiative remained robust and far reaching. We attended several academic conferences in the sciences as part of our efforts to recruit new instructors and more broadly advance our mission of improving Wikipedia’s coverage of scientific content. We encouraged several courses to work on biographies of women scientists as part of our effort to narrow Wikipedia’s gender gap and ensure knowledge equity across fields. We drew heavily on our existing network of instructors in the sciences to recruit new instructors to the program so more students have the chance to improve their ability to communicate scientific knowledge while improving Wikipedia’s content.

Figure 2. Dr. Naniette Coleman and two of her students visiting Wiki Education’s office to share how they’ve improved Wikipedia’s information about data privacy.



Goal: Strengthen and diversify instructor participation

In 2019–20, we continued our work to engage instructors more deeply in the Student Program and to foster community among our program participants. In addition to having several instructors write guest blog posts about their experience with the Wikipedia assignment, we tried out two new engagement opportunities. In Fall 2019, we launched a Slack channel for instructors running Wikipedia assignments during the Fall 2019 term. The channel was created so instructors could interact with one another and learn from one another's expertise. After assessing the utility of the channel, we concluded that it was not an effective tool for building community and encouraging engagement. The channel saw little use, and we discontinued it for the Spring 2020 term. In Fall 2019, we also launched an “end of term” email that all instructors in the program receive. The email summarizes what students did during the term and allows the instructor to easily share this summary on social media. The purpose of this email is to enable instructors to easily communicate the benefits of the Wikipedia assignment and share it broadly among their peers. In Spring 2020, we launched a mentorship program pilot; 19 new instructors were matched with 19 returning instructors in an effort to provide new instructors with more personal guidance on running a Wikipedia assignment while engaging existing program participants. We will assess the outcomes of the pilot in June 2020 and decide whether to continue and expand it during 2020–21.

Figure 3. Some of the instructors who wrote guest blogs for us this fiscal year.



Goal: Integrate equity consultant recommendations into resources

In Fall 2019, we began to implement some of the recommendations of Dr. Alex Lockett, the access and inclusion expert we commissioned to review our Student Program resources. We updated our instructor survey to reflect several issues surrounding equity, including collecting demographic data for our instructors. In Spring 2020, we launched a student demographic survey to better collect demographic data on the students we support. Dr. Lockett finalized her report in January 2020, and we began to further implement her recommendations in Spring 2020. All of her recommendations for making our instructor orientation, student training modules, and other web content more equity-oriented will be ready for the Fall 2020 academic term.

Wiki Scholars & Scientists Program

Goal: Provide high-quality experiences for Wikipedia course participants while growing the size of the program

This was our first year running courses on an entirely fee-for-service basis. We ran 18 courses in total. Eleven were part of a partnership agreement, with organizations including the Society of Family Planning, the Colorado Alliance of Research Libraries, the University of Massachusetts Lowell, the New York Academy of Science, the National Science Policy Network, the WITH Foundation, Keene State University, and the American Physical Society. We also ran two courses in our fruitful collaboration with the National Archives, focused on the history of women's suffrage in the United States. The other five targeted particular topic areas in need of development on Wikipedia: biographies of women, science policy, biology, and voting rights.

While we continued to document and adapt our program content, our efforts this year shifted from developing our support system to making it more efficient and improving communication and workflow between Programs and Advancement. We increased the minimum number of participants needed to run a course, began using Zoom breakout rooms to manage small group discussions in larger courses, reduced the amount of staff time spent in weekly classes, revised the feedback request process to put less of a burden on staff, improved documentation to enable greater flexibility, and documented several actionable tasks for next fiscal year which would enable us to continue to grow.

Though our standard course offering remains a 12-week Wikipedia training in which participants contribute to two articles, we continued to experiment with those parameters, including multiple 8-week courses and even a course which incorporated two weeks about teaching with Wikipedia. We ran one advanced course, focused on voter suppression and felony disenfranchisement, too, although its participants were disproportionately affected by the pandemic. Finally, we piloted a new kind of offering with the Society of Family Planning: an alumni program to continue support for its members who successfully completed our introductory training course.

Goal: Create Wikidata suite of courses

In July, we launched a new Wikidata Program, beginning with a course curriculum focused on teaching librarians skills they need to know to engage with Wikidata content – including how to make the content on Wikidata more accurate, representative, and complete. We have adapted the curriculum to meet the needs of these participants, incorporating new tools, examples, and workflows based on their feedback. We also tried an in-person Wikidata workshop, which generated excellent feedback for our curriculum and encouraged us to pursue online coursework rather than more workshop-based engagements.

Figure 4. Wikidata Program Manager Will Kent discussing Wikidata with an attendee of the Association of College & Research Libraries conference.



Wikipedia Expert Support

Goal: Provide high-quality support for all program participants

We were able to continue to support program participants in the Wikipedia Scholars & Scientists Program and the Wikipedia Student Program while supporting the development of the Wikidata Program. We also supported the Communicating Science initiative by attending four science conferences. We presented at the Ecological Society of America and American Meteorology Society conferences, and staffed a booth at those two as well as the Botanical Society of America and American Astronomical Association conferences. We also had presentations accepted at the American Physical Society and Allied Genetics conferences, which ended up being canceled due to the COVID-19 pandemic.

Program development

Goal: Explore how to measure article quality across different topic areas on Wikipedia

We applied for a spot in the University of Virginia's Data Science Institute projects list, but unfortunately there weren't enough students interested in our project to pursue it this year.

Stretch Goal: Develop a plan for our future Wikidata Student Program

We did not receive the grant funding necessary to pursue this stretch goal.

Stretch Goal: Develop a plan for a Women in Science biographies contest

We did not receive the grant funding necessary to pursue this stretch goal.

Targets

We project to meet all of our Wikidata goals; we also project that we will meet our overall number of participant goals. But we project we're going to fall short on our goals around Wikipedia editing. Part of this can be explained by the COVID-19 pandemic: While we were able to still support the expected number of courses in the Student Program (our highest number ever), we are projecting that expectations of amount of content added per student and number of articles edited by students will be less than typical due to the challenges in the higher education sector. We also experienced significantly less content being added by

the Wikipedia branch of our Scholars & Scientists program than expected, due to under-enrollment in courses.

Table 1. Targets for Programs in fiscal year 2019–20: goals and projected actuals.

| Description | Goal | Projected actual | Notes |
|---|-------------|-------------------------|---|
| Program participants across Wikipedia Student Program and Wiki Scholars & Scientists Program | 16,000 | 16,100 | We project we will hit this goal. |
| Wikipedia articles edited from Wikipedia Student Program and Wiki Scholars & Scientists Program | 16,000 | 14,500 | We project the reduced output from the Wikipedia Student Program from COVID-19 will cause us to just miss this goal. |
| Words of content added to Wikipedia from Wikipedia Student Program and Wiki Scholars & Scientists Program | 14 million | 11.8 million | We project the reduced output from the Wikipedia Student Program from COVID-19 (see explanation before this chart) will cause us to miss this goal. |
| Wikidata items improved from Wikidata courses | 1,000 | 10,200 | We significantly exceeded this goal. |

| | | | |
|---|--------|--------|--------------------------------------|
| Wikidata statements added from Wikidata courses | 10,000 | 35,500 | We significantly exceeded this goal. |
|---|--------|--------|--------------------------------------|

Technology

Goal: Support Wiki Education staff and programs

Our infrastructure footprint spread out further this year as we added a Salesforce-connected application and payment system in support of the Scholars & Scientists program. The Dashboard was highly stable again this year, although peripheral services – in particular, ask.wikiedu.org – have emerged as maintenance problems that will need to be addressed in the future.

Goals: Improve the Dashboard's support for the stages of students' article writing assignments; urther improve the user experience for instructors evaluating their students' work

Our main goals for developing the Dashboard this year comprised a set of new features for providing better step-by-step guidance for students developing their articles and peer reviewing classmates' articles, and a related set of improvements to make it easier for instructors to evaluate what a student did for each key stage of the assignment. We completed both sets of features, with unanticipated partial funding support from 20MM Foundation. Based on user tests with instructors in Spring 2020, and iterative improvements based on those tests, the Dashboard comes much closer to meeting the grading needs of a large portion of the instructors in our Wikipedia Student Program.

Figure 5. The latest version of the new grading-focused interface, collecting key links and tools for the selected student

Nna Bankoo
[sandboxes](#) [edits profile](#)

Assigned Articles

| Article Name | Relevant Links | Current Stage | Article Viewer |
|---------------|---|----------------------|----------------|
| 3 Years Jotna | Bibliography · Sandbox Draft · Article Reviews: SabreenAbd's Peer Review | 1/5. Getting Started | |

Reviewing Articles

| Article Name | Relevant Links | Current Stage | Article Viewer |
|--------------|--|-----------------------|----------------|
| Rosemary yin | Bibliography · Peer Review · Article | 4/4. Review Completed | |

Exercises & Trainings

| Exercises | Training Modules |
|-----------|----------------------------------|
| | 10/10 training modules completed |

Other Edited Articles

| Article Name | Relevant Links | Article Viewer |
|-------------------|-------------------------|----------------|
| Three Years Jotna | Article | |

Revisions

| Recent Edits | Words Added (article user draft) | References Added | Total Uploads |
|--------------|---|------------------|---------------|
| 4 | 2468 336 0 | 11 | 1 |

Goal: Support the global Wikimedia community's use of Programs & Events Dashboard

Usage of Programs & Events Dashboard continued to grow this year, with calendar year 2019 seeing more programs and more program organizers than any previous year. In July, thanks to summer intern Amit Joki, we delivered a major set of improvements for programs that span multiple wikis, and since then the number of help requests related to Programs & Events Dashboard is down considerably. We also completed a set of improvements focused on private data, bringing the Dashboard in line with modern private data rules.

Goal: Improve the maintainability of the Dashboard codebase and the efficiency of development processes

We improved the reliability of the test suite, fixed the most common hurdles and points of confusion in the developer onboarding process, and experimented with several strategies for better organizing code and planning work.

Targets

Table 2. Targets for Technology in fiscal year 2019–20: goals and projected actuals.

| Description | Goal | Projected actual | Notes |
|--|--------|--------------------|---|
| Uptime for wikiedu.org and dashboard.wikiedu.org | 99.5%+ | 99.9%+ (estimated) | The availability monitoring system we've used to measure downtime in the previous years is no longer available, but our main sites had no significant downtime this year. |
| Provide timely support for the technical needs of Programs and Advancement teams | | Complete | We were able to provide more sophisticated solutions to support Advancement this year, in particular, thanks to having two technologists on staff. |
| Adapt the Dashboard training framework and course timeline system for use in self-paced online-only courses to support experiments with new paid course offerings. | | Plans shifted | The launch of self-paced courses was pushed to next fiscal year. We've identified a series of possible features for Wikidata courses, and we will adapt the Dashboard for these courses as the specific needs for them are finalized during course content development. |

| | | | |
|---|--|-----------------|--|
| <p>Scaffolding and tracking of writing assignment stages launched by the start of Spring 2020 term</p> | | <p>Complete</p> | <p>We rolled these features out in late December.</p> |
| <p>Conduct user tests and make iterative improvements to the student assignment tracking features during the Spring 2020 term</p> | | <p>Complete</p> | <p>User testing January validated the basic approach; we made several improvements to our system for tracking training modules and exercises based on early feedback. Subsequent feedback from instructors and usage data from the Spring term revealed further areas for improvement which haven't been implemented yet.</p> |
| <p>'Grading mode' features ready for testing during Spring 2020 term</p> | | <p>Complete</p> | <p>We launched the first of these features in February.</p> |
| <p>Conduct user tests and make iterative improvements, for full release of grading features for all Summer 2020 and later courses</p> | | <p>Complete</p> | <p>We've conducted a large number of user tests with instructors since the February launch of a revised "Students" tab, and we implemented considerable changes based on what we learned. We also documented the diverse approaches among instructors to implementing and grading Wikipedia assignments, which is broader than the range of use cases we've optimized the Dashboard for.</p> |

| | | | |
|---|--------------------|------------------------|--|
| Continued availability of Programs & Events Dashboard for global use | | Complete | We've kept this up and running, although it started having some availability problems that we need to address soon. |
| Improve the Dashboard user experience and flexibility for common global use cases | | Complete | We made cross-wiki programs easier to configure, added the option to filter out individual articles, and integrated the popular PetScan tool as a way to specify a large set of topics to track. |
| Reduce the rate of test failures when nothing is broken to 10% or lower | | Complete | Work early in the year addressed the most significant causes of false positive test failures, which has remained at roughly 10% since. Further reduction in test failure rate will require isolating our tests from unpredictable errors in the Wikimedia systems the Dashboard connects to. |
| Maintain 100% test coverage – the portion of code that gets run during tests – for the Ruby code that runs on our servers | 100% line coverage | 100% line coverage | Ruby tests continue to provide great support for extending and modifying Dashboard features, and our test suite typically offers good examples for new developers. |
| Increase test coverage of our Javascript code that runs in a user's browser to | 50% | 39% (Approach shifted) | We explored JavaScript testing strategies while developing new features, but before embarking on a push to extend the JavaScript tests more broadly, we concluded that our |

| | | | |
|--|--|--------------------|--|
| at least 50%, up from 35% currently | | | current approaches to JavaScript tests don't provide significant value. |
| Identify the highest priority barriers in the codebase faced by new developers, and fix or ameliorate those barriers | | Complete | We made a concerted push early in the year to fix common problems we saw new developers struggle with. Due to significant changes in the Ruby software ecosystem since then, we have several new problems to address next fiscal year. |
| Review and improve communication processes for technical work | | Partially complete | Our experiments with formalizing development processes didn't offer significant improvements in efficiency over informal coordination. |

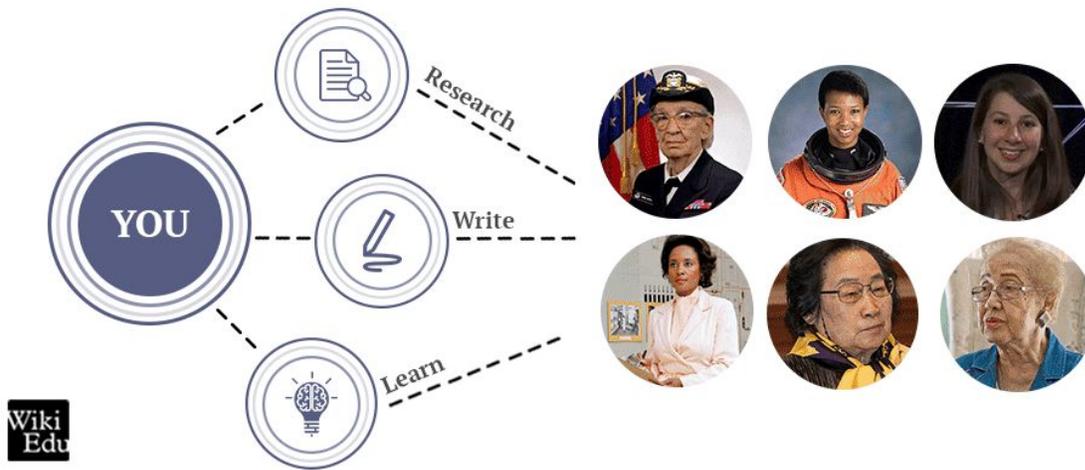
Communications

Goal: Target our communications to ensure we speak to the values of each of our audiences.

To increase engagement with our communities and invite more people to engage with our programs, we honed our messaging to be more relevant for each group. First, that meant we needed to understand what messaging was most appealing to each audience. We continually collect survey data from program participants to make informed choices when writing about or marketing our programs. To best highlight our Scholars & Scientists courses, we also hired marketing consultants M+R to help us understand what about our offerings participants and partners find most valuable.

Figure 6. Graphic designed by M+R's creative team to entice our network to help us improve Wikipedia's coverage of women in STEM.

YOU CAN CHANGE THE FACE OF SCIENCE



In an effort to distribute relevant messaging to the corresponding audiences, we made changes to our website's homepage, the most visited page of our site. Visitors can now clearly choose between navigating our teaching resources; partnering with us; or signing up to participate in a Scholars & Scientists course. We also ensured that each blog post we publish speaks specifically to one audience at a time and features next steps for readers who would like to get more involved. With these changes, we've made it more clear how we can best serve our different stakeholders.

Goal: Define a movement that newcomers are compelled to join and share with their networks.

This year, we changed the tone with which we interact with our community on our blog and social media. On social media, we employed a more colloquial and casual tone with followers. We used "we" pronouns to remind our followers that we are an organization made up of people (not synonymous with the "entity" of Wikipedia) and to emphasize that they are part of our community. We also made an effort to brand ourselves as experts when it comes to Wikipedia assignments and Wikipedia editing training. We did this by making Wiki Education and its staff more visible in the work we do. Taking more credit for enabling our program participants to do great work makes us more visible to more people with whom we want to work, partner, and build relationships.

To increase the word-of-mouth promotion of our programs through our participants' networks, we employed a new social media engagement strategy. We utilized consistent hashtags (including #WikipediaWritingAssignment) so our content is more discoverable and

to encourage followers to share about us in their own networks. When our program participants posted about their involvement in our programs, we shared the post along with an affirming comment (“*We love that this instructor is doing this!*”), celebrating the individual while also showing what exemplary membership in our community looks like. We engaged with our network’s tweets when they were aligned with our values, even if they weren’t directly related to us. This activity helps make us more visible and affirms our followers. And we diversified the content types we shared, posting photos and graphics in addition to blog links.

Goal: Create materials and develop strategies to market course offerings.

We produced banners, fliers, one-pagers, and landing pages to aid with our course recruitment. We also created identity guidelines for instructors who want to present about us. And we developed link-tracking abilities so we may analyze next year which of our recruitment channels are most effective.

Figure 7. A student in a Wiki Education-supported course visiting our booth (and Student Program banner) at the Ecological Society of America conference exhibit hall.



Goal: Publish regular, mission-driven storytelling on our website about programmatic activities.

We published regular blog posts highlighting examples of how Wiki Education staff, participants, and programs are meeting the pillars of our strategy. We continued to engage instructors in writing guest posts about their experience in the Student Program, creating an opportunity for their engagement with us and with other instructors. Alumni of our Scholars & Scientists courses also published on our blog, providing an opportunity for post-course reflection for both course participants and staff. Through roundups, we highlighted student-authored Wikipedia articles of diverse disciplines. We discovered that highlighting our Scholars & Scientists sponsor relationships through case study blogs attracts more collaborations. Testimonials from Scholars & Scientists participants about how they are using their new skills from our courses in their professional work are also effective for recruitment.

Metrics

Table 3. Metrics for Communications in fiscal year 2019–20, as compared to fiscal year 2018–19.

| Description | Fiscal year 2018–19 | Fiscal year 2019–20 through April 2020 | Notes |
|---|---------------------|--|--|
| New Student Program instructors recruited from visibility efforts, existing contacts, or social media | 218 | 205 | We're on track to stay relatively consistent from last fiscal year to this one (with a slight decrease of 5%). |
| Twitter: average impressions per month | 67,100 | 96,850 | We substantially increased how many times our tweets were viewed this fiscal year by 44%. |
| Average monthly website pageviews | 9,445 | 10,777 | We stayed consistent from last fiscal year to this one, with a slight increase of 14%. |

Advancement

Fundraising

Goal: Raise \$2,150K through philanthropic support.

Our grant revenue during the first three quarters of fiscal year 2019–20 was roughly on track with what we had projected in our last annual plan. For Q1 to Q3, we had budgeted a total revenue through grants of \$1,700K and until the end of March 2020, we were slightly under with a result of \$1,565K. For Q4, we were expecting the renewal of a larger grant of

\$485K. When the COVID-19 pandemic hit the economy and the stock market in the United States, an institutional funder that had verbally committed to support Wiki Education with this grant told us the money might not come in this fiscal year as they were “looking into how the pandemic will affect [their] endowment”. Had the money been disbursed before June 2020, we would have ended up with an actual of \$2,050K against a budget of \$2,150K (5% variance). However, at the time of the writing of the report, we don’t expect this grant to be disbursed in fiscal year 2019–20 any more. Although a portion of these \$485K got compensated by our successful application for a small business loan (SBL) as part of the United States’ Payroll Protection Program (\$302K) on May 1st, the total amount of money hitting our bank account through grants and SBL combined still falls short by \$293K (\$1,857K actual vs. \$2,150K budgeted).

Table 4. Grant revenue budget vs. actuals for fiscal year 2019–20, breakdown by quarter

| | Budget | Actual |
|---|-----------------|-----------------|
| Q1 | \$749K | \$899K |
| Q2 | \$525K | \$283K |
| Q3 | \$416K | \$383K |
| <i>Subtotal Q1–Q3</i> | <i>\$1,700K</i> | <i>\$1,565K</i> |
| Q4 | \$450K | \$0K |
| <i>Q4 incl. revenue lost through COVID-19 pandemic effect</i> | <i>\$450K</i> | <i>\$485K</i> |
| <i>Projected result without the effect of the COVID-19 pandemic</i> | <i>\$2,150K</i> | <i>\$2,050K</i> |
| Actual result | \$2,150K | \$1,565K |

We don’t think the fact that our successful fundraiser TJ Bliss left Wiki Education in January to pursue other career goals in his local community in Boise, Idaho, had much to do with the fact that the \$485K renewal didn’t come through. Between January and April TJ continued to support our fundraising efforts on a contract basis and ensured a smooth transition to our new fundraiser Paul Carroll, who started his work only a month after TJ left. Instead, we heard the message that foundations were looking into “how the pandemic

affects their endowment” from more than one institution, which we think makes sense given the potential magnitude of the economic crisis due to the COVID-19 pandemic.

Overall though, we’re disappointed with the outcome of this year’s fundraising efforts. We had expected much more, in particular as the overall trajectory of our annual revenue had steadily pointed upwards over the past two years.

At a time, when facts are under attack in the United States and the general public struggles with finding unbiased and trustworthy information online, the impact that an organization like Wiki Education generates over the course of a year seems far more valuable than just ~\$1.6 million. Given that millions of people benefit from the quality improvements Wiki Education’s program participants bring to Wikipedia, the current support through institutional funders seems disproportionately low and nowhere near the value that our organization generates. An analysis conducted by senior staff in fall 2019 and discussed with Wiki Education’s board in January 2020 points to two main issues:

- Wiki Education’s mission of providing the general public with access to accurate and reliable information aligns with the interests of funders in many sectors generally, but not often with the core philanthropic strategies and programs of these funders.
- Wiki Education competes for grants with the Wikimedia Foundation, which is a far more desirable partner for institutional donors and for high net-worth individuals (“shinier object”) due to Wikimedia’s high profile as the organization that “runs Wikipedia”.

Going forward, we will have to address these two problems, while also attempting to generate more unrestricted revenue through our Selling Services model.

Partnerships

Goal: Partner with several institutions who consult with Wiki Education in our fee-for-service model.

This year, Wiki Education partnered with universities, Centers for Teaching and Learning, academic associations, research institutes, galleries, libraries, archives, and museums that have aligned missions to bring high quality knowledge to the public. Twelve partners consulted with Wiki Education in our fee-for-service model in fiscal year 2019–20.

Goal: Assist partners and sponsors in recruiting and onboarding participants for Scholars & Scientists course offerings.

In the sponsored courses we ran in partnership with institutions, Wiki Education staff recruited enough qualified applicants to fill each seat of the course. We developed marketing materials and applications to distribute to potential participants. We attended in-person conferences, held informational webinars, and promoted opportunities on social media. As we learned more about productive recruitment methods, we spent less staff time on each sponsored course, often tapping into partners' extensive networks to reduce the enrollment period. For each sponsored course, we received more applications than the number of open seats, demonstrating the efficacy in recruiting. Additionally, we retained one sponsor, the Society of Family Planning, who sponsored additional courses beyond our original contract.

Figure 8. Director of Partnerships Jami Mathewson in conversation with Society of Family Planning Wiki Scientist course alumni at their Fall 2019 conference.



Goal: Experiment with ways to align our course offerings with individual participants' needs and goals.

We spent this year learning more about why participants applied to a Scholars & Scientists course. We learned via applications, end-of-course surveys, and via our marketing consultant M+R about ways to meet participants' professional or personal needs. We have found certificates are a motivating factor, so we will continue offering course certificates. We found individuals interested in a Wikipedia course were inspired by the urgency of a course topic and their personal feeling of becoming a change-maker, which we will use to

leverage future courses and initiatives. Librarians interested in Wikidata courses were motivated by how the course learning outcomes aligned to their daily work, so we will explore other industries where individuals can benefit from linked open data in their daily work.

Table 5. Targets for Advancement in fiscal year 2019–20: goals and projected actuals.

| Description | Goal | Projected actual | Notes |
|---|---|---------------------|---|
| Maintain positive relationships with our existing funders, resulting in renewals of all existing grants at current or increased funding levels. | Renewal of all existing grants | Incomplete | We received a renewal from the Stanton Foundation and a renewal at an increased rate from the Hewlett Foundation. The COVID-19 pandemic delayed renewals from other funders. |
| Successfully acquire renewal funding from the Wikimedia Foundation. | Acquire renewal funding from the Wikimedia Foundation | Complete | We received a \$400K renewal of our grant from the Wikimedia Foundation. |
| Secure an additional \$340K in new grants. | \$340K in new grants | \$66K in new grants | We received several small new grants, including from the WITH Foundation, the Michelson 20MM Foundation, and the Leighty Foundation, but we did not secure a large new grant. |

| | | | |
|---|--------------------------|--------------------------|--|
| Generate at least \$257K in earned revenue. | \$257K in earned revenue | \$223K in earned revenue | Given that our Scholars & Scientists Program is still relatively new, we are not yet able to predict earned revenue coming through this source accurately. |
|---|--------------------------|--------------------------|--|

Selling Services

Goal: Raise at least \$257K in earned revenue through contracts and fee-for-service payments.

Going into this fiscal year, we had little precedent for generating earned income and contracting directly with institutions. Based on early success of collaborating with larger organizations, we projected \$257K in earned revenue through contracts and fee-for-service payments. As the fiscal year closes, we project generating \$223K in earned revenue.

Though we do not expect to fully hit our earned revenue goal this year, we have a much better understanding of how much revenue we can generate per course going forward, helping us project for next year. Additionally, we better understand institutions payment schedules, as most of them make multiple payments per contract, allowing us to make more refined quarterly projections.

Goal: Develop a data-driven approach to projecting revenue from contracts and fee-for-service payments.

We explored different models for funding Scholars & Scientists courses: Individual Payer, Institutional Payer, and Funder-Assisted.

Individual Payer courses take more staff time to be successful during the recruitment phase, but we can execute as soon as we have an opening in our capacity to run a course that we have not filled with a sponsored course. Meanwhile, Institutional Payer courses take much longer (in extreme cases up to 12 months) to close a contract with a sponsor, yet these courses have generated more revenue overall, per participant, and per week in the course.

This year, we also experimented with selling other services (e.g., helping run an edit-a-thon or consulting services). Given that none of these options have the potential to scale, we will discontinue all such experiments and focus on our Scholars & Scientists courses that bring much needed subject-matter expertise to Wikipedia and Wikidata while supporting our organization financially.

Overview

Table 6. Revenue breakdown by quarter, for fiscal year 2019–20.

| | Q1 | Q2 | Q3 | Q4 [1] |
|----------------------|-----------|-----------|-----------|---------------|
| Revenue Total | \$940K | \$340K | \$456K | \$66K |
| <i>Foundations</i> | \$899K | \$283K | \$383K | \$0K |
| <i>Individuals</i> | \$1K | \$5K | \$7K | \$1K |
| <i>Earned Income</i> | \$40K | \$52K | \$66K | \$65K |

Notes:

[1] Projections made based on actuals through May 13, 2020. This reflects the impact of the COVID-19 pandemic on our fundraising efforts.

Expenses

Our plan for fiscal year 2019–20 called for total expenditures of \$2,277K. At the end of Q3 and before the implications of the global COVID-19 pandemic took effect, our year-to-date

expenses were \$6K under budget (a variance of less than 1%). Due to an accounting process change to the allocation of indirect operational costs in Q2, we saw overspending in General & Administration (as we no longer re-allocated professional service fees from General & Administration to indirect administrative costs in Programs and Advancement) and underspending in Programs and Advancement (for the same reason). An adjustment was made in October to recognize this change for Q1. Of these, payroll fees, accounting and audit costs went back in General & Administrative, and showed as underspending in Programs and Advancement.

When the effects of the COVID-19 pandemic hit California in March, we closed our office and canceled outside services like janitors, printer lease, part-time administrative help, etc. Also in March, we canceled all domestic and international travel until further notice. The Presidio Trust graciously offered all its tenants to postpone the April rent payment and add one more month at the end of the lease, which we accepted.

Over the course of the year, we worked hand-in-hand with SFBay Financial (our financial services provider based in San Francisco) on monitoring the financial health of the organization and providing timely reports to Wiki Education’s Board of Trustees.

Table 7. 2019–20 Financials: Plan vs. Projection

| | 2019–20 Plan | 2019–20 Projection [1] | 2019–20 Projection incl. forgivable small business loan |
|----------|---------------------|-------------------------------|--|
| Revenue | \$2,407K | \$1,808K | \$2,110 |
| Expenses | \$2,277K | \$2,248K | n/a |

Notes:

[1] Projections made based on actuals through May 13, 2020.

Human Resources

Staffing

In early January 2020, Chief Advancement Officer TJ Bliss left Wiki Education to pursue a new opportunity as Chief Academic Officer at the Idaho State Board of Education. TJ remains a strong ally of our organization, and continues to support us on a voluntary basis.

We immediately started our search to fill in the fundraiser position, and worked with m/Oppenheim, a local Bay Area recruiting firm on identifying strong candidates. In the first week of February 2020 we welcomed Paul Carroll as Director, Institutional Funding. Paul's focus is on identifying new funding opportunities and maintaining relationships with our institutional funders. Having spent his professional career at the nexus of philanthropy, government, and nonprofits, Paul is a great fit for establishing and cultivating Wiki Education's relationships with institutional donors; managing day-to-day fundraising activities; and ensuring that Wiki Education delivers on its grant agreements.

As TJ supported us on a contract base for three months after his departure, Paul and TJ had several conversations to help Paul better understand existing funding obligations, the relationships with our donors, and the needs ahead with respect to reporting, seeking follow-on funds, and prospecting for new sources of support. This all ensured a successful onboarding and a smooth transition.

At the end of April, our software developer Wes Reid left Wiki Education after receiving a job offer that we couldn't match.

HR Operations

In order to reduce staff time spent on manual time tracking and expense reimbursements, as well as to eliminate the potential risk of human errors, we started using online HR tools made available through our PEO service TriNet. Over the course of several months, we launched, tested, and then fully converted to online time management and expense reimbursement systems. The online time management tool allows employees to track their vacation and sick hours online or on their mobile application and request time off directly from their supervisors. Approved time-off requests are directly submitted to payroll.

Online expense reimbursement request system allows employees to keep track of their expenses, compile them into a report, and submit their expense reports to their

supervisors online or via mobile application. Approved expense reports get submitted to, and are processed through payroll.

Both time tracking and expense reimbursement tools save time for employees, supervisors and administrative staff and eliminate the risk of potential errors caused by manual entry. Finally, digital recordkeeping allows us to save energy by eliminating paper expense reports and physical copies of time-off approvals.

HR Policies

At the beginning of October, we released our new vacation policy. The new policy had been in the works for a while, and our goal was to adjust our vacation policy to the realities of modern work life and improve the work-life balance of our employees.

With an increasing number of people on staff now having young children or living an active lifestyle (which we both encourage and support), the amount of vacation days per year has become something our staff care more about. Also, the previous vacation policy had employees only reach the highest amount of vacation days after “more than 10 years” of employment, which didn’t seem to be in sync with the realities of companies in the San Francisco Bay Area.

Our new vacation policy provides more paid time off for all of our employees to allow better work-life balance. The new policy also has reduced cap on vacation banks in order to reduce the financial liability of the organization.

Figure 9. Staff photo in February 2020



Organization-wide remote work due to COVID-19

At the end of February and in response to the COVID-19 outbreak in California, we made working out of our San Francisco office optional. The measure aimed at reducing the spread of the virus and protecting those staff members that could potentially get infected by using public transportation or rideshare services. Following the WHO's official declaration of the outbreak of a pandemic on March 11, 2020, we announced the closure of our San Francisco office as of March 12, 2020 and until further notice to protect our staff members and help reduce the spread of the virus. Our switch to 100% remote work was comparatively easy, given that half of our organization has been already remote and the fact that we have a very tech-savvy staff and video conferences and instant messaging services like Slack have been a part of our daily work for years.

Looking ahead: the 2020–21 Plan

High-level view of the time ahead of us

This annual plan has been created in times of high uncertainty. The COVID-19 pandemic has a firm grip on large parts of the globe. In the United States, more than 36 million people have lost their jobs (as of mid May 2020), the stock market has dropped significantly, and much of the country is in a state of lockdown. The full extent of the economic crisis we're facing is still unclear. All we know is that we cannot ignore the effects of the COVID-19 pandemic on this countries' education system, on its cultural institutions, and – most importantly for our financial outlook as a nonprofit – on philanthropy.

Wiki Education has traditionally relied on larger unrestricted operational grants. Given the severity of the impact of the COVID-19 pandemic on the economy and the uncertainty around the endowments of institutional funders, we don't expect to generate the revenue that would be necessary for keeping our operations on the same level as in the past. We know some grants officers are still looking into the effects of the pandemic on their endowments, where others have already told us that they won't accept new grantees for the foreseeable future. One of our upcoming Wikipedia projects with a group of museums had to be postponed because the museum staff that was scheduled to take our courses had been furloughed. All of this is alarming and requires a swift and decisive response.

That's why, in order to not jeopardize our organization's survival and Wiki Education's positive impact on the public's access to accurate and trustworthy information, we're planning on significantly reducing our expenses, starting in July 2020. We will move Wiki Education fully online to save the money we're currently spending on our office space in the Presidio of San Francisco. Furthermore, we will reduce our headcount significantly, yet in a way that will allow us to provide our core services to an extent that is reasonable under the current conditions.

At the same time, we're seeing some signs of hope, given that Wiki Education's staff is incredibly tech savvy and adjusted quickly to the fact that they have been working from home since March. Also, the move from on-campus classes to online learning comes with a greater demand in our services and there are signs that this trend might continue. Most

importantly, the commitment of our staff and board to Wiki Education's mission has been so incredibly deep and strong in the past that we're confident we can master all hardship that lies ahead of us.

From a high-level point of view, the year ahead of us will be challenging. Given the ongoing uncertainty about the future, we will have to continue monitoring the developments closely and be willing to adjust our approach whenever needed. Agility and perseverance are the stars that will guide us through next fiscal year.

Programs

Wikipedia Student Program

Goal: Support new and returning faculty who are eager to teach with Wikipedia

Our flagship program will continue, but we expect the COVID-19 pandemic's impacts will continue to be felt throughout this fiscal year. Given our reduced staffing capacity, we expect a similar reduction in courses we support in the Student Program. For those who we support, we will focus on improving training resources and expanding a mentorship program based on results from an ongoing pilot.

Goal: Implement equity recommendations

Last fiscal year, we worked with Dr. Alex Lockett to review our tools and resources for the Student Program as they relate to knowledge equity, and began taking her recommendations into account. In summer 2020, we will launch a full implementation of changes based on Dr. Lockett's work, in time for the start of the fall 2020 term. After the fall 2020 term, we will evaluate the impact of the changes and determine any appropriate next steps.

Scholars & Scientists Program

Goal: Increase the impact of current synchronous course offerings

We intend to continue offering synchronous Wikipedia and Wikidata courses. In fiscal year 2020–21, we will look at expanding the communities we reach by adapting the curriculum and model to meet others' needs.

Goal: Explore self-directed Wikidata courses

In fiscal year 2020–21, we will launch a new self-paced Wikidata course. We will also explore additional self-paced course offerings.

Wikipedia Expert Support

Goal: Provide support for Wikipedia and Wikidata programs

We will provide program participants with the help they need in order to have a positive experience while making high-quality contributions to Wikipedia and Wikidata.

Program development

Stretch Goal: Develop a plan for a Women in Science biographies contest

Pending grant funding in early 2021, we will begin developing a new initiative that's a hybrid of the *Wikicup* and the *Art+Feminism* campaign, in which universities will gain points from the amount of content, references, and images added to Wikipedia biographies of women scientists. The contest is slated for fall 2021, but we will begin the planning and development phase of the program in this upcoming fiscal year 2020–21.

Targets

Table 8. Targets for Programs, last year actual vs goal for this year

| Target | 2019–20 Actual | 2020–21 Goal |
|----------------------------|-----------------------|---------------------|
| Program participants | 16,100 | 9,000 |
| Wikipedia articles edited | 14,500 | 8,000 |
| Content added to Wikipedia | 11.8 million words | 6 million words |

Technology

Goal: Support Wiki Education staff and programs

The Technology department is responsible, in broad strokes, for supporting staff efficiency and program growth through technology. In addition to maintaining our current technical systems, we expect to work on improvements to the Dashboard, our WordPress website, and our Salesforce configuration. As in previous years, we anticipate identifying many small technical needs, bugs, and areas for improvement throughout the year. Our work in these areas will automate tedious processes, let staff work more efficiently, and make our websites and services more user-friendly.

Targets

- 99.5% or greater uptime for dashboard.wikiedu.org and wikiedu.org
- Provide timely support for the technical needs of the organization

Goal: Adapt the Dashboard training system for Wikidata and/or Wikipedia self-paced courses

Our first self-paced course for Wikidata will be launched this fiscal year, and we will use the Dashboard training system as the basis for our early exploration of self-paced courses. This is likely to require a number of changes to allow more interactivity, possibly including Wikidata connectivity, more robust knowledge checks, and scoring.

Targets

- Support the successful launch of a Wikidata self-paced course

Goal: Create a flexible checkout system for course sales

As we explore new approaches to the Scholars & Scientists Program as well as self-paced courses, we expect to switch to a low-touch approach where the entire process of selecting, paying for, and enrolling in a course can happen without staff intervention. To enable this, we'll need to implement a shopping/checkout system that is easy to reconfigure as necessary, and that integrates with the Dashboard and/or Salesforce.

Targets

- Deploy a checkout system for fixed-price course offerings

Communications

Goal: Publish regular, mission-driven storytelling on our website about programmatic activities.

We will publish regular posts on our website about Wiki Education's work, sharing our impact, learnings, travel, and stories related to equity, quality, and reach of Wikimedia content. We will highlight participant-authored Wikipedia articles related to our strategy, publish testimonials by program participants, and maintain (or increase) our typical web traffic.

Targets

- Maintain engagement with our community through social media
- Support the recruitment of Scholars & Scientists course participants through social media campaigns

Advancement

Partnerships

Goal: Recruit subject-matter experts for our Scholars & Scientists Program through meaningful, reciprocal institutional partnerships.

In order to recruit subject-matter experts for our Scholars & Scientists Program, we will seek meaningful, reciprocal partnerships with academic associations, research institutes, galleries, libraries, archives, museums, and universities.

Based on our learnings from fiscal year 2019–20, we will narrow the focus of our Scholars & Scientists outreach. The goal is to implement 2–3 topical initiatives related to improving Wikipedia and Wikidata so that we can streamline our messaging to target prospective sponsors whose missions align with our initiatives. For example, we know that institutions are motivated to increase the visibility of women in STEM through Wikipedia, so we will develop materials to target scientific institutions who have a stake in surfacing the work of women in STEM to the public.

Targets

- Recruit a sufficient number of subject-matter experts through institutional partnerships for at least 12 six-week Scholars & Scientists courses aimed at filling gaps in underdeveloped content areas on Wikidata and/or Wikipedia

Selling Services

Goal: Improve the cost-to-revenue ratio of our fee-for-service offerings by increasing the efficiency of our sign-up, payment, and onboarding process.

In March 2020, the Advancement team went through a process-mapping exercise in order to identify opportunities for streamlining the sign-up, payment, and onboarding process of our Scholars & Scientists Program. By creating process flowcharts, team members documented the path a program participant takes from learning about the existence of our Scholars & Scientists courses to being issued a certificate for successful completion. The process-mapping exercise revealed areas where the workflow needs to be automated in order to ensure that the cost-to-revenue ratio of the Scholars & Scientists Program improves. For this purpose, in fiscal year 2020–21, the Advancement team will transition to a new workflow and partner with the Technology department on designing and implementing a checkout system for course sales as described above.

Goal: Experiment with self-paced Wikidata online courses in order to explore a more scalable solution for our Scholars & Scientists Program.

Our current way of running Wikipedia and Wikidata courses is based on a synchronous model: course participants sign up for a course that gets held at a specific day of a week at a specific time. Course participants then gather in front of their screens and interact with one of our Wikipedia or Wikidata trainers in real time through Zoom video conferences. This model is attractive to those subject-matter experts that enjoy collaborating and communicating with their peers in different parts of the United States. However, coordinating the time schedules and conducting real-time training not only cost a lot of staff time, the current model also doesn't scale sufficiently. In order to bring a larger number of subject matter experts from museums, libraries, universities, and other institutions to Wikipedia and Wikidata, we will start experimenting with self-paced online courses and document our learnings in order to determine which role these self-paced online courses will play in the future.

Targets

- Generate at least \$124,800K through Scholars & Scientists program service fees (equaling a minimum revenue of \$10,400 per course at a minimum size of 13 participants per course, which will leave room for two additional participants per course who pay a reduced rate or are allowed to participate for free)
- Document the learnings from experiments with self-paced online courses in order to set our Scholars & Scientists Program on a path for scaling

Fundraising

Goal: Build an effective Advisory Board that functions as a door-opener to new institutional funders.

The creation of a framework for an Advisory Board was the first result coming out of the analysis of our fundraising situation in late 2019 and the discussions senior staff had with our board in January 2020. The primary responsibility of Advisory Board members will be to speak knowledgeably and passionately about the work of Wiki Education to people in their networks, with the goal of influencing others to support the organization financially. Advisors will be encouraged to stay on top of Wiki Education's activities and to make introductions for Wiki Education's staff to potential funders and influencers as opportunities arise. In fiscal year 2020–21, we will begin recruiting and onboarding well-connected people for our new Advisory Board and start working with them on identifying and approaching new institutional funders.

Goal: Maintain a healthy relationship with existing donors.

Maintaining a healthy relationship with existing donors will be key during this time of crisis. While our current funders know our organization as high-performing and strongly focused on results and impact, they might be tempted to cut off existing grantees as their endowments have already been affected by economic instability in Q2 of calendar year 2020. Their funds might even take a stronger hit as the COVID-19 pandemic develops further. Based on all we know at this point, we expect the economic crisis to accelerate if a second wave of infections hits the United States in the fall of 2020. We hope this will not lead to de-funding our work, as adding reliable, accurate, and representative information to Wikipedia and Wikidata is even more critical in a world that is exposed to misinformation and conspiracy theories. To ensure that our existing funders clearly understand the

enormous value Wiki Education generates, we will continue maintaining active communication and stay in close touch with our long term supporters.

Goal: Further adjust our fundraising approach based on the recommendations developed in late 2019.

In addition to building an Advisory Board, we will further adjust our fundraising approach based on the analysis conducted in late 2019:

- In the past, we've approached too many institutional funders whose interests, philanthropic strategies and programs didn't align with our work. That's why, going forward, we will focus more on identifying and approaching funders who clearly care about our vision of "providing trustworthy information to the general public".
- Instead of trying to sell a prefabricated solution, we will collaboratively brainstorm "cool projects" with prospects and then develop a proposal.
- As our work is difficult to differentiate from the work of the Wikimedia Foundation, we will consider pursuing joint fundraising projects with Wikimedia. Conversations about opportunities for collaborating on "content campaigns" have already begun and will be continued in fiscal year 2020-21.
- In order to increase our appeal to new donors, we will focus on teaming up on specific projects with "blue chip" organizations that funders are keen to support (this part of our new fundraising strategy is well underway: we signed a memorandum of understanding with the Smithsonian in late 2019, and we've been working with the National Academies of Science and the Global Women's Forum).
- "People fund people": going forward, we will have our ED spend more time with prospects than in the past in order to build long-term personal relationships with potential funders.

Projected Revenue

Our projected revenue, classified by quarter and fundraising component, is detailed in Table 9 below.

Table 9. Projected revenue, by quarter, for fiscal year 2020-21.

| | Q1 | Q2 | Q3 | Q4 | TOTAL |
|--|-----------|-----------|-----------|-----------|--------------|
|--|-----------|-----------|-----------|-----------|--------------|

| | | | | | |
|----------------------|--------|-------|------------|-------|----------|
| Revenue Total | \$371K | \$37K | \$795K | \$37K | \$1,242K |
| <i>Grants</i> | \$334K | \$0K | \$658K | \$0K | \$992K |
| <i>Earned income</i> | \$37K | \$37K | \$137K [1] | \$37K | \$250K |

Notes:

[1] This includes \$100K of an already confirmed contract with the Smithsonian that aims at improving biographies of women in American history; the project has been put on hold as the museum staff that was supposed to learn how to contribute to Wikipedia had been furloughed.

Expenses

Drastic changes in the environment an organization operates in require a swift and decisive response. That’s why we’re planning on making the following changes to how Wiki Education has operated in the past:

- We’ll give up our physical office and move the organization 100% online. This will be relatively easy as our staff is very tech savvy and we’re all used to interacting through tools like Slack, Zoom, and Google Meet.
- We’ll significantly reduce our headcount, yet in a way that will allow us to provide our core services to an extent that is reasonable under the current conditions. Also, we’ll reduce our three highest paid employees weekly work hours to 70% in order to further lower our costs.
- All in-person meetings in fiscal year 2020–21 will be moved online. This applies to all-staff meetings as well as to board meetings. Travel will be suspended until the year 2021.

Table 10. 2020–21 Plan revenue and expenses

| | 2020–21 Plan |
|----------|--------------|
| Revenue | \$1,242K |
| Expenses | \$1,145K |

| | |
|--------------------------|--------|
| General & Administrative | \$254K |
| Programs | \$556K |
| Technology | \$165K |
| Advancement [1] | \$170K |

Notes:

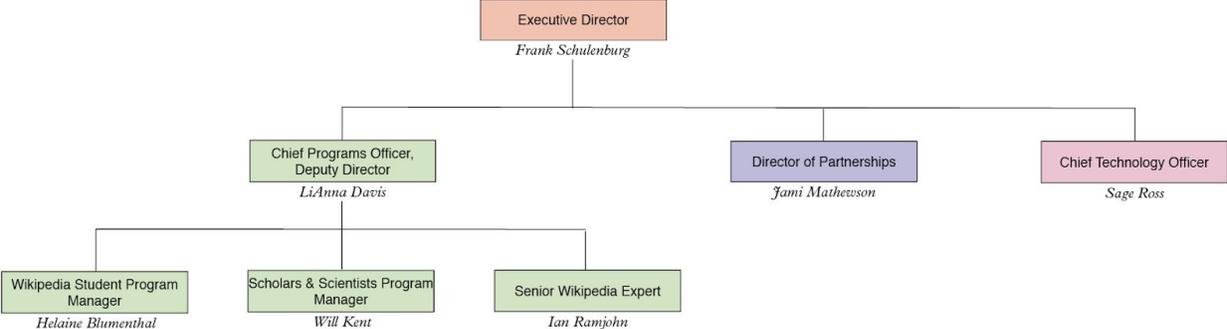
[1] Large parts of Advancement activities will be programs-related.

Human Resources

Given the negative effects of the economic crisis in the United States on philanthropy, we will proactively reduce our organization’s expenses to a bare minimum, while attempting to preserve as many of our services as possible. As staffing has traditionally been our highest expense, we will lower our headcount to 7 and also decrease the weekly work hours of our highest paid employees by 30%.

We will furthermore move all operations online and try to find a sub-tenant for our office in the Presidio of San Francisco at the earliest point in time possible. All our staff is highly tech-savvy, used to solve issues with their equipment or software themselves, and familiar with the most common solutions for online communications (Slack, Zoom, Google Meet, etc.) Our current tech infrastructure is already adapted to the needs of an organization with an above average number of remote staffers.

Figure 10. Organizational chart for fiscal year 2020-21



Board Resolution

RESOLVED, that the Board of Trustees hereby approves management’s proposed 2020–21 annual plan, which includes \$1,242K of revenue, \$1,145K of spending. Given the ongoing COVID-19 pandemic and related financial uncertainty, we acknowledge that in fiscal year 2020–21 revenue and/or spending may differ considerably from what’s in this plan. We believe it’s important that Wiki Education’s Executive Director have as much flexibility as possible as the situation plays out. Therefore, we want to explicitly encourage the Executive Director to do what he thinks is best for Wiki Education on the basis of the information available to him throughout the year, and not to feel unnecessarily or artificially constrained by this plan, which was developed in a period of great uncertainty. Through fiscal year 2020–21, the Executive Director should feel empowered to depart from the plan without prior board consultation or approval, when he feels that speed and responsiveness is more important than consultation.

Table 11. Quarterly breakdown of the Annual Plan financials 2020–21

| 2020–21 Plan | Q1 (Jul.–Sep.) | Q2 (Oct.–Dec.) | Q3 (Jan.–Mar.) | Q4 (Apr.–Jun.) | Total |
|--------------------|----------------|----------------|----------------|----------------|----------|
| Operating Cash [1] | \$169K [2] | \$244K | \$8K | \$510K [4] | |
| Cash Revenues [3] | \$371K | \$37K | \$795K | \$37K | \$1,242K |
| Cash Spending | \$297K | \$273K | \$294K | \$281K | \$1,145K |

Notes:

- [1] As of the beginning of the quarter.
- [2] Operating cash available at the beginning of the fiscal year (July 1) is based on projected expenditures and expected unspent funds carried forward from FY 2019–20 as per June 3, 2020.
- [3] Anticipated/projected revenue.
- [4] Anticipated cash of \$266K to be available at the start of fiscal year 2021–22.

Appendix

Risks considered in developing the 2020–21 plan

1. Existing funders back out of verbal agreements due to the negative effects of the COVID-19 pandemic on their endowments.

There are a lot of open questions about what the future holds in the wake of the economic instability caused by the COVID-19 pandemic. We anticipate funders will be more risk-averse during our next fiscal year; we hope this will not lead to de-funding our work, as adding reliable, accurate, and representative information to Wikipedia and Wikidata is even more critical in the physically distanced world we now inhabit. To mitigate this risk, we will continue maintaining active communication with our existing supporters.

2. Unforeseen expenses increase our monthly spending in Q1 and Q2.

Our budget this fiscal year is much more simple than it has been in past years – but given its bare bones nature, we are also more likely to feel the effects of an unplanned expense than we have in the past. Keeping an eye on the cash flow will be particularly critical in Q1 and Q2 as we don't expect to add additional new funders in the second half of calendar year 2020 given the effects of the ongoing COVID-19 pandemic in the United States. We have put a lot of time and thought into crafting this year's budget, and we will continue to closely monitor spending and revenue to ensure we will be financially stable throughout the fiscal year.