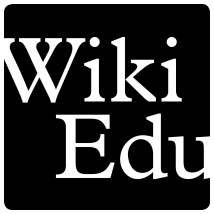


Wiki Education Foundation
2015–16 Annual Plan

Table of Contents

Background and context

The Wiki Education Foundation incorporated in June 2013 and established operations in February 2014. Whereas the time from our incorporation until June 2014 is best described as the "founding stage" of the Wiki Education Foundation, July 2014 to June 2015 has been a phase of organizational growth, learning, and increased impact.

Many of the milestones we reached over the year were "firsts". In July 2014, we conducted our first quarterly review, establishing an organizational performance system. Our first Wikimania as Wiki Education Foundation representatives was in August. We moved into our first office in September, after working from home and rented workspaces. In October, our first software prototype went live, and our board approved Wiki Education Foundation's first annual plan and budget in November. In December, we met with key funders and submitted our first interim grant report. In January 2015, our full staff met for the first time in San Francisco, we started our first experimental pilot program in February. In March, we kicked-off our first strategic planning process, and April saw the first ED performance review. In May, we successfully supported 117 university courses across the United States and Canada.

Many startups struggle or fail during their first year. The success of our young organization during 2014–15 is possible because of the strong support and encouragement of our funders, an enthusiastic and results-driven staff, the high personal commitment by members of our board, and a growing mutual trust and fruitful working relationship between Wiki Education Foundation's board and leadership team.

Looking back: 2014–15

Summary of 2014–15 Performance

Our top priorities in 2014–15 were scaling our support for instructors and students, and pursuing new approaches that broaden participation in our programs. We've built and consolidated our organizational structures to maximize our impact on the millions of people who use Wikipedia as a free resource – particularly, those seeking information from underdeveloped content areas.

Early in 2014, it was clear to us that scaling our system of support would be a challenge. We needed automated systems to complement, and even replace, the one-to-one phone and email support from our staff. Those systems needed to ensure the same, if not better and more standardized, services. In fall 2014, we collaborated with WINTR, a Seattle-based software development company, to help create online tools to scale our support system.

After this year, we know we can create easy-to-use software that fulfills the needs of educators and students. We're confident that we can deliver software solutions on time and at high quality.

We're also giving our software to the community, released under an open source license. Volunteers have already adopted that software for their own purposes.

We've also taken the first steps at partnering with academic associations and champions. These partners will promote our programs across campuses in the United States and Canada. Furthermore, The Wiki Education Foundation has expanded its offering of free educational materials to help instructors with Wikipedia assignments both on and offline, while offering a rich learning experience for students.

We have built an organization, from scratch, that delivers results and is in line with the internal processes and procedures required for running an effective non-profit business.

In 2014–15, the Wiki Education Foundation has secured the trust of funders, hired highly skilled staff, built productive relationships between staff, the Executive Director and its board, created a system of internal controls and policies, and completed a collaborative strategic planning process that set the direction for the future.

Activities, Goals and Targets

Our 2014–15 Annual Plan outlined specific activities, goals, and targets in seven main areas: Classroom Program Scaling, Program Innovation, Program Support, Other Activities, Strategic Planning, Board Development, and Staff Development. We'll report on each of these areas individually.

Classroom Program Scaling

The core program of the Wiki Education Foundation, the Classroom Program supports university instructors who want to incorporate Wikipedia assignments into their classrooms. Our Annual Plan called for a gradual scaling of the number of classes that participated in the Classroom Program. We set specific targets for the gender gap content area, quality of content, and educational partnerships to help us scale.

Number of classes

In our Annual Plan, we set out to support 215 courses this fiscal year, and we achieved exactly that number. However, we had set specific targets for fall and spring that we didn't hit exactly. In fall, we supported 13 more classes than we had anticipated, and in spring we supported 13 fewer classes. The smaller number of classes in spring is in part a result of stricter guidelines for instructors. In spring, we consciously chose to refuse courses with poorly designed assignments, even if it meant missing numeric goals for the second term. We believe increased quality was a better outcome.

Figure 1: Number of Classes, long-term trend

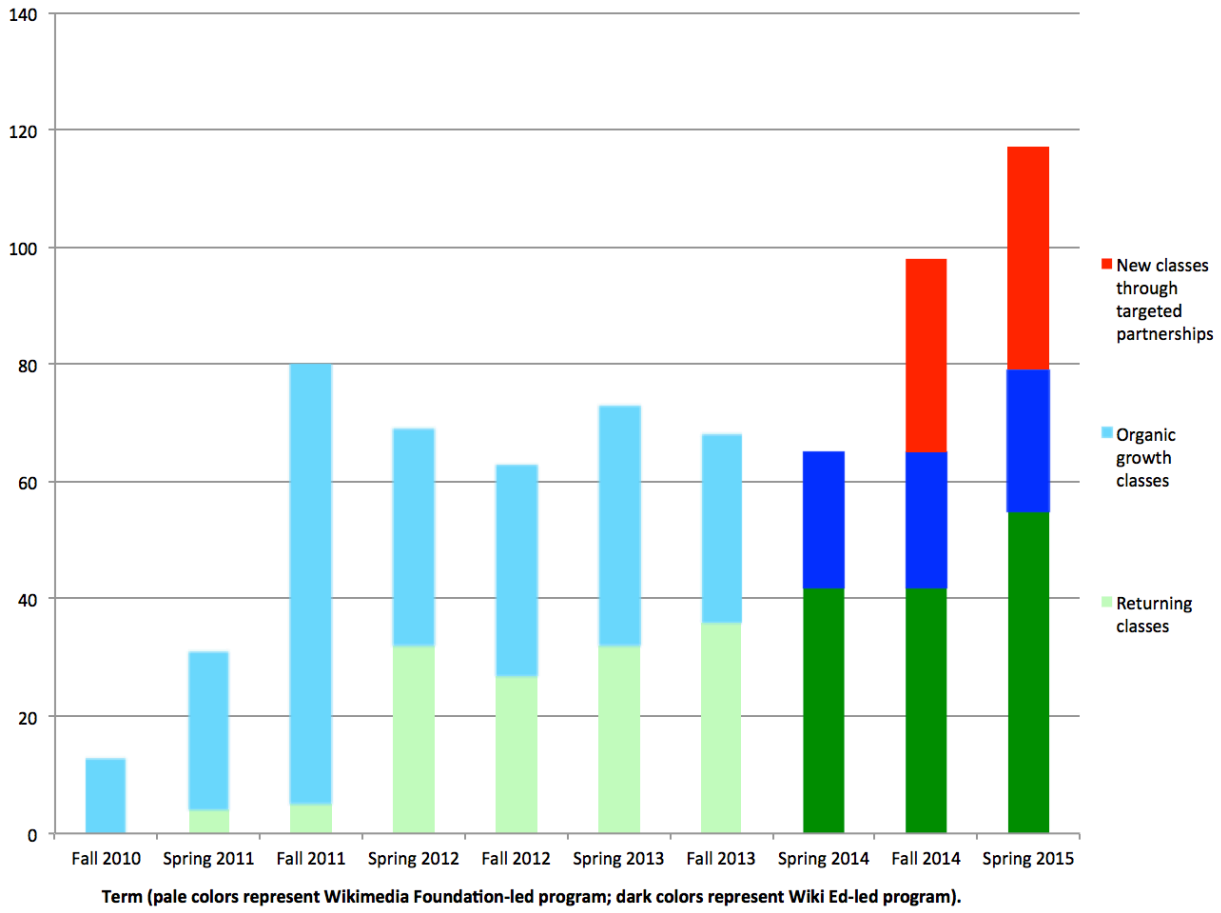


Table 1: Number of classes, 2014–15 plan vs. actuals

	2014–15 Plan	2014–15 Actuals	Variance from plan
Fall 2014	85	98	+15%
Spring 2015	130	117	-10%
Total	215	215	0%

Gender gap

Our program has successfully encouraged women to edit Wikipedia since its inception. Not only have our students historically been at least 60% female, we've also worked with classes where student editors are writing on topics that we define as "gender gap" topics. These are topics where information is relevant to demographics usually underrepresented in the existing editing community.

We exceeded all of our goals for this measurement this year, significantly increasing the number of improved gender gap articles from our baseline of 90 in Spring 2014 and maintaining a 68% female student editor percentage, according to survey results.

Table 2: Number of improved gender gap articles and percentage of female student editors, 2014–15 plan vs. actuals

	2014–15 Plan	2014–15 Actuals	Variance from plan
Number of gender gap articles, Fall 2014	at least 100	170	+70%
Number of gender gap articles, Spring 2015	at least 130	188	+45%
Percentage of female student editors	at least 60%	68%	+13%

Scaling our recruitment of program participants

Our 2014–15 plan called for the creation of a new staff role to scale our recruitment efforts at universities. During the fall 2014 and spring 2015 terms, we experimented with three different approaches, measured the outcomes, and made adjustments based on our learnings.

Establishing partnerships with academic associations has proven to be one of the most promising approaches. Our goal was to sign five of these in this fiscal year; we are projecting to have signed six by year end. While the negotiation of formal partnership agreements took longer than anticipated, the actual collaboration with those institutions has already demonstrated strong results. Our partnerships targeted academic associations within certain disciplines, with goals set with each partner for articles edited in that discipline's content area. The results surpassed the expectations we set for each partnership. We see this as an indicator that these association partnerships are an impactful way of filling content gaps in targeted areas.

In our work with universities, we discovered that our second experimental approach of partnering with a department or center at a university, and supporting the university staff acting as program

management for that camps led to poor assignment design and an insufficient level of support for participants in our Classroom Program. As a result, we stopped pursuing formalized partnerships with universities. Instead, we looked for university centers and departments interest in teaching with Wikipedia, and used those as outreach opportunities. Wiki Education Foundation staff presented to university faculty in person on 11 university campuses this term. Thus, we were able to focus our class recruitment at universities where there is institutional support for Wikipedia assignments, but without establishing formal partnerships.

Our third approach, scaling our recruitment of Classroom Program participants, was designed to work through individual "champions" on university campuses. Champions can be librarians, professors, or graduate students who have participated in our program in the past. They recruit and serve as trainers and resources for new instructors on their campus, sustainably expanding our number of classes. Our 2014–15 plan called for an increase from 49 to 60 university champions. We increased the number of university champions to 92, almost doubling their number year over year and surpassing our goal by 53%. As a result, champions at different universities recruited 42 new participants for our Classroom Program in fall 2014 and spring 2015.

Table 3: Number of partners and champions, and outcomes of partnerships work, 2014–15 plan vs. projection

	2014–15 Plan	2014–15 Projection	Variance from plan
Association Partners, Fall 2014	3	2	-33%
Association Partners, Spring 2015	2	3 [1]	+50%
University Partners, Fall 2014	2	1	-50%
University Partners, Spring 2015	3	0	-100%
Number of university champions	60	92	+53%
Number of articles edited from partnerships	15% increase	40% increase	+167%

Notes:

[1] As of the writing of this document, one memorandum of understanding had been signed in Spring 2015; partnership negotiations with two other associations are underway and expected to conclude successfully in the second half of June 2015.

Quality of content

In spring and fall terms of the Classroom Program, content added by student editors was deemed to be high quality, based on the assessment of our Wikipedia Content Experts, who regularly monitored student work, and Wikipedia volunteers. Many student articles were added to the Trophy Case, a space on Wikipedia where good student contributions are recognized. We also began featuring student work each week on the Wiki Education Foundation's blog, highlighting the best 3–5 articles in each class that produced great work. Many of these articles also appeared in our Monthly Reports, spotlighting the high quality contributions of our student editors for our organization's stakeholders. Students added high quality content in important subject areas like science, history, and arts on Wikipedia, helping close content gaps.

Past studies have clearly proven and quantified quality improvements by students. Nonetheless, we'd like to develop better metrics to provide internal performance measures and better ways of demonstrating impact to stakeholders.

Table 4: Percentage of featured student work, 2014–15 plan vs. actuals

	2014–15 Plan	2014–15 Actuals	Variance from plan
Percentage of work featured on Trophy Case, Fall 2014	5%	6%	+1%
Percentage of work featured on Trophy Case, Spring 2015	5%	12%	+7%

Quality of support for instructors and students

While our fall term students had more incidents with failing to comply with important Wikipedia policies (as explained earlier, due to poor assignment design), we were able to quickly provide staff interventions when problems arose. We received praise from many in the Wikipedia editing community for how we handled incidents. One editor, who had brought up several problems, specifically called out the Wiki Education Foundation's response as being "a refreshing case of doing it 'right'". The spring term went extremely well, with few incidents and a significant amount of high quality content added to Wikipedia. We believe the spring success can be partly attributed to our increased dedication to ensuring assignment design was appropriate, and a

significantly larger percentage of students who completed our online student training (52% in spring 2015, in comparison to 28% in fall 2014 and 25% in spring 2014).

Our goal for 70% satisfaction rate among instructors was surpassed; we had an 88% satisfaction rate from instructors in the fall. The addition of our Wikipedia Content Experts enabled us to provide more detailed and timely feedback to students and instructors, and their work paid off in a higher than expected satisfaction rate from our program participants.

Table 5: Incident resolution and instructor satisfaction rate, 2014–15 plan vs. actuals

	2014–15 Plan	2014–15 Actuals	Variance from plan
Average days for incident resolution, Fall 2014	5	2.5 days	+100%
Instructor satisfaction rate, Fall 2014	70%	88%	+26%
Average days for incident resolution, Spring 2015	5	1.7 days	+194%
Instructor satisfaction rate, Spring 2015	70%	t.b.d. [1]	t.b.d. [1]

Notes:

[1] As of this writing, the instructor survey (which asks satisfaction rate) has not had a sufficient number of responses to determine this number.

Program Innovation

In addition to our Classroom Program, we set a specific goal to explore programmatic work outside of the classroom setting with a pilot program targeting high-achieving students in student groups. We set two specific goals: (1) Executing a small pilot with students who will improve Wikipedia's content in at least two different topic areas; and (2) documenting learnings and recommending next steps.

We successfully executed a small pilot with six student clubs. A total of 45 students improved 361 Wikipedia articles and created 47 new articles in topics including geology, water issues, horticulture, art and design, and communications. A documentation of learnings and recommendations for next steps will be completed and published in June.

Program Support

Our digital infrastructure and communications work forms the basis of our Program Support work. We achieved significantly more in this area this fiscal year than we had set out in the Annual Plan.

Digital Infrastructure projects

We had three projects outlined in our Annual Plan within the Digital Infrastructure area: An Assignment Design Wizard, a plagiarism-checking feasibility study, and a Program Dashboard. Not only did we complete all three of these projects, we also made significant progress on two additional projects. Much of this success can be contributed to our work in finding an external design and development firm, WINTR. That collaboration has produced high-quality results, often ahead of schedule, enabling us to exceed our goals in digital infrastructure.

The Assignment Design Wizard launched on schedule in November. More than 100 instructors used the Assignment Design Wizard to craft course pages for the spring term, and the guardrails we established for assignments created through the Wizard ensured that all courses participating in our program followed best practices. We partly attribute the significant reduction in incidents between the fall and spring term to the Wizard, which incorporated best practices into a variety of course plans.

By February 2015, our plan called for a feasibility study to assessing the possibility of plagiarism checking our student editors' work. We finished that study, and even had the first version of the tool up and running by April. That success came thanks to a collaboration with Wikipedian James Heilman, who funded the development of a plagiarism detection 'bot' (a software application that runs automated tasks over the Internet). Wiki Education Foundation staff collaborated with the bot developer to ensure the bot would function for student editors.

Because of our great working relationship with WINTR, we were able to roll out the Dashboard project four months ahead of schedule. Launching in February, rather than June, enabled all spring 2015 courses to use it. The Dashboard provides an overview of all students enrolled in classes, how much content they've added to the article mainspace and to sandboxes, the list of articles they've edited, and the amount of page views those articles have received since the students started editing. It also provides a global view for program managers to see the every course participating in any program during that term.

We achieved everything we set out to do, and launched the plagiarism detection bot. We also made significant progress on another important development project: a replacement for the Education MediaWiki Extension that currently runs course pages on Wikipedia. We learned from the Wikimedia Foundation in the fall that they don't intend to actively develop the Extension in the future and would at some point like to turn it off. All of our programmatic work relies on that functionality. For much of spring 2015, we focused on building a full-feature Course Pages

system to replace the functionality of the Extension without relying on the Wikimedia Foundation's technical support. By the end of the fiscal year, our new Course Pages system was functioning well enough to replace the base level of support offered by the Education MediaWiki Extension.

Communications projects

The major focus of communications work (beyond the day-to-day support for the organization) was the creation of a series of discipline-specific handouts. The Annual Plan called for one, on psychology, to be released in September; a second one available in January; and two additional handouts available by June. The psychology handout was released as a PDF and printed in August, and was followed by two handouts released in December, on editing in medicine and sociology. Two more handouts were published in May, on women's studies and ecology, bringing the total of handouts to five. All were released ahead of schedule.

The other project outlined in the Annual Plan was the creation of a brochure addressing the themes of knowledge production. This publication features case studies for how four program participants use Wikipedia assignments to get students to think about theoretical issues tied to the production of knowledge. It includes descriptions of how these instructors engage theories of knowledge production, suggested readings, and discussion questions they use in class. The brochure will be published in June.

Other Activities

Two other activities were identified: Supporting the planning and organization of a peer reviewed academic conference, to be held in the second half of 2015, and supporting the organization of WikiConference USA.

In early March, Diana Strassmann and Frank Schulenburg had an initial meeting with Shadi Bartsch-Zimmer, Director of the newly launched Stevanovich Institute on the Formation of Knowledge (SIFK) at the University of Chicago. This meeting served at getting to know each other and providing Shadi Bartsch-Zimmer with general information about the Wiki Education Foundation and its core activities. At our board meeting in April, the board decided to postpone the academic conference. It also decided to have a second meeting with Shadi Bartsch-Zimmer, this time including board members John Willinsky, Bob Cummings, Diana Strassmann and ED Frank Schulenburg. The second meeting will serve to explore potential partnership opportunities with the SIFK; but hasn't taken place at the time of the writing of this document.

We made significant progress on the support for Wiki Conference USA this fiscal year. We gathered stakeholders from the Wikipedia community in the United States for a planning session held in March, and agreed upon a division of responsibilities and goals for the conference. We were able to secure the donation of a venue for the conference, which will take place in October

2015 at the National Archives in Washington, DC. Our involvement in Wiki Conference USA planning has created social capital with the local Wikipedia community and created opportunities for partnering with Wikimedia chapters.

Strategic Planning

The Annual Plan called for us to complete an initial 6-month strategic planning process to outline the basics of our long-term strategy. We kicked off this strategy process in December by starting to identify experts to seek for guidance, and by laying out the different steps of the process through June 2015. The first major milestone was an in-person strategy kick-off meeting with board members and key advisors in late March. Together, the board, leadership team members, and experts analyzed our organization's external environment and current resource base. We identified leverage points in our external environment as well as strengths and weaknesses in our organization's human capital, financial situation, and work processes. Subsequently, the leadership team reflected on learnings and discussions from this first meeting and presented themes and possible directions for our programmatic work to the full board at a second in-person meeting in April. The strategic direction agreed upon by board and senior leadership at that meeting served as the foundation for this annual plan and budget.

Board Development

With our board having grown in both size and expertise during the Wiki Education Foundation's first half year of operations, it became vital for the board and staff to collaboratively develop clarity around their respective roles and alignment around our organization's strategy. In three in-person board meetings (November 2014, March 2015 and April 2015), our board and leadership team established mutual trust and clarified areas of responsibility. As a result, we have completed a six-month strategy process (see above) that sets our organization's direction for two years. Also, the board established an Audit Committee to oversee the finances of our organization on a monthly (through written reports) and quarterly (through conference call meetings) basis. In conjunction with the ED and the Director of Finances and Administration, Audit Committee members established internal financial control mechanisms and hired a renowned audit firm for our first annual audit. Supported by advice from outside pro bono counsel, the board adjusted the Wiki Education Foundation's bylaws to the needs of a growing organization. With the help of an external consultant, the newly formed Governance Committee developed a board members' skills matrix that will serve as the basis for recruiting new board members with specific expertise. A board meeting schedule has been created, and board and staff have been collaborating on improving our organization's mission and vision statements.

Staff Development

At the beginning of this fiscal year, the Wiki Education Foundation had six staff; by the end, we had thirteen. In more than doubling our staff, we brought on people unfamiliar with our organization and programmatic offerings. We spent significant time developing the skillsets and institutional knowledge in our new staff. An all-staff meeting in January helped coalesce our staff into a well-functioning, collaborative group, and offered the opportunity to perform a group training in "Crisis Management and Communication". In addition, staff members were offered individual development measures, including personal leadership coaching sessions, attendance of a two-day course as part of an Advanced Project Management certificate program at Stanford University, Adobe InDesign and Premiere training, a three-day "Management Skills for New Managers" training offered by the American Management Association (AMA), and a series of Product Management coaching sessions. Furthermore, we encouraged staff to request the purchase of books related to their specific work area and share their learnings with their co-workers. As a result of these measures, our staff members have excelled as they've grown into new roles. The work of our organization is more effective because of the efforts we've put into staff development.

Revenue, Expenses, and Staffing

Revenues

We started the FY 2014-15 having secured $1,723,000, roughly 89% of our total funding needs for the year. This created an excellent cash flow situation so that our efforts could be concentrated on delivering programmatic results instead of worrying about securing funds to operate. Our accomplishments and results, in such a short amount of time, impressed our two major funders. This was no more apparent as when we completed our Digital Infrastructure goals ahead of schedule and were looking to move on to the next phase early. However, this was not planned, and funding to move to the next phase was not secured. Due to the strong relationship we had developed with the Stanton Foundation, we were able to secure an additional $300K in funding for our Digital Infrastructure work.

Expenses

To ensure financial stability and oversight, the Audit Committee was established to work closely with the Director of Finance and Administration. Working together, the Audit Committee and management established key points to maintain high efficiency and control over Wiki Education Foundation's finances. Key points taken during the year, included:

- Financial / accounting functions were brought in-house, increasing the accuracy and timeliness of financial information.
- Dual control and approval were implemented and incorporated into many of our policies, with constant review of policies to confirm they remain valid as we grow.

- Re-aligned our fiscal year to coincide with programmatic activity by updating and correcting our tax return.
- Evaluation and selection of an audit firm.
- Established a local bank account to manage daily activities more effectively and securely.

Table 6: 2014–15 Finance: Plan vs. Projection

	2014–15 Plan	*2014–15 Projection*	*Variance from Plan*
Revenue	$1,943K	$2,030K [1]	+5%
Expenses	$1,938K	$1,878K [2]	-3%

Notes:

[1] Includes an additional $300K tech grant from Stanton Foundation spanning the total time period between March and August 2015.
[2] Includes four months of spending (March–June) from the additional $300K Stanton tech grant.

Staffing

During FY 2014-15, we worked against an aggressive staffing timeline and filled all six positions called for. Only one position was filled with a considerable delay. We had a turnover in two positions, one of which was a key position on our leadership team. We set an internal goal of refilling this position by May 1 and actually completed the hiring process on May 13. We also used this as an opportunity to work with an executive recruiting agency, which proved to be successful and set the stage for future recruitment work. An extensive onboarding checklist, as well as internal documentation of organizational processes (e.g. "travel arrangement process", "approval request process") ensures that new staff members are productive early on.

The combination of ambitious goal setting for our programmatic work in FY 2014-15 and our internal reporting structure resulted in one key staff member being overworked. We resolved the issue by making immediate adjustments to the employee's workload and by changing our reporting structure.

In addition to our already competitive benefit system, we implemented a "Wellness Reimbursement Program" designed to promote and encourage wellness and personal growth. This program has been fully embraced by our staff and will thus be continued.

We also succeeded in building an environment that works for remote workers and staff in San Francisco alike. Remote workers (4 staff members out of 13) have been supplied with technical infrastructure that makes it easier for them to join staff meetings and individual check-ins through video conferencing technology. Local San Francisco staff is working out of a functional and productive office environment in the Presidio, close to a number of like-minded non-profit organizations.

Table 7: 2014–15 Staffing: Plan vs. Projection

	2014–15 Plan	*2014–15 Projection*	*Variance from Plan*
Staffing	12 (11 FTE)	13 (11.5 FTE)	+5%

Looking ahead: the 2015–16 Plan

Overview

In 2015-16, we will continue our focus on building technical infrastructure aimed at scaling our core program, while preparing and launching a large targeted editing and student learning campaign ("Wikipedia Year of Science").

Programs will be split into three departments to bring additional leadership strength to the organization and to rebalance the senior management team. We will also invest staffing resources to improve data analysis capacity and to evaluate our programmatic activities. This will increase our ability to measure, track, and demonstrate impact, while further improving program outcomes.

In response to the board's interest in deepening our engagement with academics, we will allocate dedicated resources in the new "Program Innovation, Analytics and Research" department. This will enable us to launch an academic Summer Fellowship program, pilot a Summer Seminar encouraging psychology instructors to contribute content to Wikipedia, host a one-day workshop with members of the academic research community, and develop a strategy for empowering academics to conduct qualitative and quantitative research around Wiki Education Foundation's programmatic activities. Furthermore, as part of the Wikipedia Year of Science, we will take the first steps at making our engagement with the academic community "bidirectional" by exploring how resources in the academy can help existing Wikipedia editors with their work (instead of just focusing on how members of the academy can add content to Wikipedia).

We will make small investments in Communications, Finance / Administration, and Fundraising in order to keep up with the needs of a growing organization.

Key Initiatives in 2015–16

Building Digital Infrastructure

A major focus for the 2015–16 plan is to increase the pace of our Digital Infrastructure work. This work, started last year, created a technical support structure for our flagship program, the Classroom Program. Through this work, we are able to provide technical solutions to roadblocks that are keeping the Classroom Program from scaling: challenges that require staff time intervention to help individual program participants. Through projects like creating a dynamic online training, developing a proactive student assistance tool, and producing a reactive help response system for instructors, we can target bottlenecks that require staff time, and address them with a technical solution instead. Not only do these technical solutions help us scale up our impact, they also provide our program participants with the tools to make participating in our programs easier. For example, providing a dynamic online training module for students will

provide better learning about Wikipedia, enabling the instructor to focus valuable class time on instruction of the subject matter of the course instead of on Wikipedia, which students can learn through our training in their own time.

We will also spend time refining and building out new features for the digital infrastructure projects completed last year, including our course pages system, our dashboards, and our assignment design wizard. Based on feedback from our program participants, we will continue to determine additional development and maintenance needs for these projects, all the while helping us build the support structure for us to scale the Classroom Program, provide additional support to other programs we may pursue in the future, and make the experience of participating in our programs better for all our stakeholders.

Wikipedia Year of Science

The Wikipedia Year of Science will be the first large-scale campaign involving US and Canadian higher education institutions that improves Wikipedia content quality in underdeveloped areas. Along the way, we will engage thousands of students in science communication and knowledge sharing.

The majority of the campaign will focus on a proven model: The Wiki Education Foundation's Classroom Program. In this facet of the campaign, university science faculty will assign students to edit course-related topics on Wikipedia as a class assignment.

The Wikipedia Year of Science will be an ideal opportunity to explore program potentials beyond the Classroom Program, such as digital content donations from university science museums, or placing Wikipedia editors as Visiting Scholars at universities. The experimental program that shows the most promising results will be developed into a scalable program model to expand its impact beyond the Wikipedia Year of Science.

The campaign is designed as a 19-month effort with the following phases:

- September–December 2015: During the preparation phase, we will establish the infrastructure needed to launch the Wikipedia Year of Science in early 2016. That includes creating tools and resources, and establishing partnerships and other relationships to reach a broad audience for our programs in 2016.
- January–June 2016: At the beginning of 2016, we'll kick off the Wikipedia Year of Science with a large push for science courses to participate in our Classroom Program while experimenting with additional pilot program offerings.
- July–December 2016: Based on the results of the spring term, we will develop a model around the most promising experimental program. We'll continue the work of the Classroom Program to improve science content, and add larger pilots with other programmatic offerings found to have the most impact.

- January–March 2017: Based on the experiments in establishing a model during the fall term, we will create a scalable model for continuing this work after the end of the Wikipedia Year of Science. We will determine if future "Year of" campaigns are successful models for improving content on Wikipedia while engaging instructors and students in reflecting on the creation and communication of knowledge.

The Wikipedia Year of Science is the direct outcome of our strategic planning process. We see it as the fulfillment of the board and the senior management's desire of setting an audacious and aspirational long-term goal for our organization. Embarking on a large-scale initiative will bring focus to our work, encourage teamwork, and increase fulfillment and pride among staff. At the same time, a larger and more visible project like the Wikipedia Year of Science will offer new opportunities for fundraising and for improving our organization's image in the public.

The Wikipedia Year of Science is based on the assumption that a large targeted campaign will increase enthusiasm and buy-in from instructors, students, and the Wikipedia community. With adding a dedicated "Women in Science" component (aimed at improving coverage on women scientist biographies), we will continue and expand our commitment to improving content related to the gender gap on Wikipedia.

Activities, Goals and Targets

The new departments "Programs", "Programs Support", and "Program Innovation, Analytics, and Research" will build technical infrastructure to scale our core program, while preparing and launching the Wikipedia Year of Science.

Programs

The Programs department houses our core programs: the Classroom Program, the Community Engagement Program, and Educational Partnerships. Each of these programs will focus on the Year of Science, but will continue to support all other Wikipedia editing. Rather than set specific targets for each program that measure *activity* (such as how many partnership agreements we sign, how many classes we have on board, etc.), we've chosen to set targets for the *impact* on Wikipedia and students (how many students we work with, how much content they add to Wikipedia, etc.).

In the next section, we'll describe each program before defining the specific targets for impact from all aspects of our core programmatic work.

Classroom Program

Our flagship program is our Classroom Program. In this program, university faculty assign students to contribute content to Wikipedia as part of their class activity. We will continue to

grow the number of participants in our Classroom Program in 2015–16, with a special focus on the sciences. The student editors who participate in the Classroom Program receive an enriching service learning opportunity, wherein they grow skills in writing, research, critical thinking, media literacy, and technology, all while helping counter the systemic bias on Wikipedia. The growing number of participants will contribute more content, edit more articles, add more images, and otherwise improve Wikipedia's content in academic subject areas that are traditionally underrepresented on Wikipedia, all with the support of Wiki Education Foundation staff. Staff will recruit, onboard, respond to queries from, and otherwise support instructors and students participating in the Classroom Program in 2015–16.

Community Engagement

One of our newer programs, the Community Engagement work focuses on bidirectional programmatic work: in other words, how can the resources in the academy help existing Wikipedia editors with their work? Much of the Community Engagement work will focus on building community within the existing editor base in support of the Year of Science. We will host a Wikipedia Year of Science preparation meeting in the fall, gathering community leaders to develop a strategy for how Wikipedians and universities, including campus museums and libraries, will work together in 2016.

In addition, we will grow the Wikipedia Visiting Scholars Program, in which university departments create unpaid Visiting Scholars positions that are filled by Wikipedia editors. In exchange for a university login and access to the university's library databases and other resources, the Wikipedia editor agrees to create a certain number of high-quality articles in a subject matter of interest to that university department. As part of the Year of Science, we will seek out university science departments interested in hosting a Wikipedia Visiting Scholar, and identify community members who would be good candidates for those positions.

Educational Partnerships

Our Educational Partnerships work feeds into our Classroom Program and Community Engagement work. By establishing partnership agreements with academic associations, we open a recruiting pipeline of instructors who are interested in participating in our Classroom Program. That improves the information available in their discipline on Wikipedia, while creating an enriching learning opportunity for the students in their classrooms. The Educational Partnerships work with academic associations involves approaching relevant associations, creating partnership agreements, presenting at association conferences, creating materials specific to that discipline for recruitment and support, and otherwise fulfilling terms of the partnership agreement. For the Year of Science, the focus of the academic association work will be on associations in the sciences.

Our Educational Partnerships work also focuses on recruiting at the university level. That means on-campus presentations at universities that have expressed interest in large-scale participation in the Classroom Program from that university, but also recruiting university departments to host Wikipedia Visiting Scholars. By working with university libraries, teaching and learning centers, and individual departments, Educational Partnerships work fosters relationships that feed into a recruiting pipeline for our core programmatic work. For the Year of Science, we will especially focus on recruitment within science disciplines, including a special focus on biographies of women scientists.

Impact targets

Our work in the Classroom Program, Community Engagement Program, and Educational Partnerships will all feed into the following annual targets, with baseline numbers from 2014–15:

- Number of Wikipedia articles improved: 10,000 (up from baseline of 7,800)
- Number of words added to articles: 7.8 million (up from baseline of 5.8 million)
- Number of images uploaded to Wikimedia Commons: 3,000 (up from baseline of 2,000)
- Number of new images uploaded and used in articles: 2,000 (up from baseline of 1,100)
- Number of images recognized as "Quality Images" on Wikimedia Commons: 100 (up from baseline of 0)
- Number of students having an enriched, reflective, and productive learning experience: 6,500 (up from baseline of 5,000)
- Number of articles on women scientists improved: 80 (up from baseline of 40)
- Number of articles from the list of the most-accessed but lowest-quality articles improved: 20 (up from baseline of 0)

Programs Support

The Programs Support team's mandate is to provide a support structure for all programmatic work at the Wiki Education Foundation. Included in Programs Support is our Digital Infrastructure work to build technical tools for programs, our Communications work to create support materials for program participants, and our Wikipedia Content Experts, who provide feedback to program participants.

Digital Infrastructure

As described above, Digital Infrastructure plays a key role in our work this year. We will develop four additional new tech applications, as well as provide refinements to the existing applications.

- First up is a project we're calling the "just-in-time bot". This bot will provide automated help and suggestions to students and instructors based on automatically detected situations where our Content Experts currently intervene manually. The just-in-time bot will watch student activity and notify students and instructors with relevant messages. For

example, these messages would be related to the discovery of potential plagiarism, suggestions of publishing to mainspace, etc.
- Target: Just-in-time bot has launched, Q2

Another major project is a new, reactive version of our online training. Training is currently offered through a series of interlinked Wikipedia articles. The platform offers very little control and metric data of users. This project would replace the current training tool, hosted on Wikipedia pages, with a custom built equivalent. In addition to porting existing functionality, we will add quizzes and tools to track student progress. The training will be tied into the Course Pages system, so that content would be dynamically generated based on what the students are asked to do in the assignment and the subject matter of their course.
- Target: Online training system is ready for use, Q3

The third project is our instructor survey. We currently rely on a third-party survey system to gather feedback from instructors at the end of every term. Our new built-in survey feature will automatically survey instructors after the end of their course. It will be tied into the Course Pages system as the final step in the process of teaching a course within that platform. This tool will provide more relevant and timely feedback, and a higher survey completion rate.
- Target: Instructor survey is in use, Q4

The fourth and final project is our article finder. One of the first steps toward successful Wikipedia authorship is the selection of appropriate content to edit or create. The Article Finder tool will help instructors and students search for and select articles in need of editing and contributions.
- Target: Article finder tool is functioning, Q4

While we develop new technical applications, we'll continue to iterate on existing projects. We will be adding features to the Assignment Design Wizard, Course Pages, and Dashboard to make these systems meet the needs of all programs under the Wiki Education Foundation umbrella.

Communications

In addition to supporting the communications needs of the organization, our Communications team creates support materials for program participants.

Building on the success of last year's discipline-specific handouts, we will create four additional handouts presenting in-depth information about how students can contribute to specific content areas on Wikipedia. Many of these will focus on science topic areas in support of the Year of Science initiative.
- Target: One handout per quarter each quarter

As Digital Infrastructure is creating its new dynamic online training, Communications will be developing the content for that system. We will revamp the content of the student and instructor training with a more modular approach. That way, we can deliver specific information aimed at particular assignment types and course disciplines.

- Target: Training content deployed, Q3

One scalability challenge in our current model is that recruitment of new instructors comes through face-to-face meetings at universities and academic conferences. Many of our existing instructors, librarians, and others at universities are interested in promoting our programmatic activities at these events, but they lack the knowledge of how to explain Wiki Education Foundation's role in what we do; they only see it from the participant side. We believe training these volunteers in how to champion Wiki Education Foundation's work will allow us to enable volunteers to do more of the face-to-face work at academic conferences and universities, representing Wiki Education Foundation, as they are interested in doing. This includes developing a slide deck for volunteers, providing useful talking points, and then training volunteers to use them.

- Target: Volunteers in five locations have completed volunteer skills development training, Q3

The Year of Science project will depend upon an on-wiki portal to foster community engagement and enthusiasm around the initiative. This Year of Science portal will be a central organizing hub for Wikipedia editors, instructors, and students collaborating on improving Wikipedia's coverage of science topics.

- Target: On-wiki portal is created, Q2

Finally, we will build an "Understanding the community" brochure. In this brochure, we'll explain why newcomers may receive critical feedback from long-term Wikipedia community members, and help provide key recommendations for interacting with community members productively.

- Target: Understanding the community brochure is printed, Q4

Wikipedia Content Experts

Our two Wikipedia Content Experts will continue to provide high-quality support for program participants, including instructors and students. The two positions, one focused on the sciences and one focused on the humanities and social sciences, provide advice to new contributors on what articles are ripe for improvement, offer feedback on drafts that participants have started, and suggest ways to improve articles even more. While we recognize that the digital infrastructure work will help us scale up our program, we firmly believe there will always be a need for in-person support for students and instructors to answer the difficult questions and provide personal responses as needed, which is why we believe the Wikipedia Content Experts remain crucial to our program. Throughout the year, the Wikipedia Content Experts provide a valuable resource for all program participants as they navigate writing Wikipedia articles.

- Target: 90% satisfaction rate with support received from Content Experts (baseline: 85% from Fall 2015)

Program Innovation, Analytics, and Research

The Program Innovation, Analytics, and Research team will experiment with programs that show potential for increasing Wiki Education Foundation's impact on Wikipedia and student learning. It will focus on academic engagement and pilot programs. It will build and maintain analytics and performance systems that help the organization monitor key performance metrics, and use data to support informed decision making across the organization. It will endeavor to empower others to conduct qualitative and quantitative research around Wiki Education Foundation's programs.

Academic Engagement

We will conduct a pilot evaluating the potential for instructors interested in contributing content in their area of expertise during the summer. We will pilot a Summer Seminar focused on psychology in summer 2015, in which instructors meet weekly for one month to learn how to edit Wikipedia articles. At the end of this pilot, we will draft a final report documenting outcomes and suggesting next steps.

- Target: Summer Seminar pilot is complete, Q1

A key facet of academic engagement work is determining how individual academics' work can affect our programmatic work. We will pilot a new month-long Summer Research Fellow program in summer 2015. We'll host an academic to help us answer outstanding questions from our programmatic work. For the inaugural Summer Research Fellow, we'll focus on creating a strategy and selecting case studies outlining how university libraries, museums, and archives could work with instructors, students, and/or the community of Wikipedia editors as part of the Year of Science. We will evaluate the effectiveness of hosting professors or graduate students in a Summer Research Fellow program to meet our long-term goals.

- Targets:
    - Summer Research Fellow completes project, Q1
    - Social event with Summer Research Fellow and researchers attending the OpenSym 2015 conference (OpenSym 2015, the 11th International Symposium on Open Collaboration, will take place in San Francisco) hosted at Wiki Education Foundation's office, Q1
    - Evaluation on effectiveness of Summer Research Fellow model complete, Q2

The new Program Innovation, Analytics, and Research team will develop a plan to empower others in conducting qualitative and quantitative research around Wiki Education Foundation's programmatic activities. For this purpose, it will initiate conversations with institutions and individuals concerning the role research can play in advancing the programmatic work of the Wiki Education Foundation.

- Target: One-day workshop assembles Wiki Education Foundation staff and members of the research community to explore ways of future collaboration, Q4

University Museums, Libraries, and Archives Pilot
The strategic planning process showed a potential for increased impact through collaborations with university libraries, archives, and museums. To tap this potential, we will run a pilot aiming at exploring ways to integrate university museums, libraries, and archives into the Wikipedia Year of Science, while enriching the learning experience for students enrolled in our programs.

- Target: We will have executed experimental programmatic activities that meld the work of instructors, students, and/or the community with university libraries, museums, and archives, and documented our learnings and recommendations for next steps, Q4

Analytics

A key deliverable for the new Program Innovation, Analytics, and Research team will be to build and maintain analytics and performance systems, and to empower and support data-informed decision-making across the organization.

- Target: Analytics and performance systems exist and provides staff and other stakeholders with meaningful and correct information about our organization's programs performance, Q4

Other activities

The Wiki Education Foundation will support the planning and execution of Wiki Conference USA 2015. The two-day event, which will be held at the National Archives in Washington, DC, will gather Wikipedia community members, university instructors, and representatives from museums, libraries and archives. It will provide an opportunity for members of these groups to discuss their work, and to share best practices and learnings. The event will strengthen the ties between Wikipedians and professionals in the higher education and cultural sector, aiming at a better mutual understanding and setting the stage for future cooperation. The Wiki Education Foundation's involvement in the conference will improve our relationship with the Wikipedia community, offer instructors and students in our programs an opportunity to present and get feedback on their work, facilitate dialogue between academics and Wikipedians, and enhance our organization's public profile through the partnership with the renowned National Archives.

Revenue, Expenses, and Staffing

Revenue

We will build a sustainable base of funding to support existing programs, new pilot programs, and scalability. We will identify and cultivate relationships with foundations, corporations, and

individuals that have an interest in advancing access to knowledge, innovations in learning, and diversity in online media.

Goals:

- Sustain existing grants
    - Stanton Foundation (3-year commitment)
    - Anonymous individual donor (2-year commitment)
- Add additional institutional support
    - Foundation grants
    - Corporate grants
- Explore opportunities for individual support
    - Major Gifts
    - Events
- Improve reporting and communications
    - Create grant reporting master calendar
    - Develop additional fundraising collateral
    - Create visibility for the fundraising
- Engage Wiki Education Foundation board members in fundraising

Target:

- Secure $3.7M in total revenue for FY15/16 (which includes new individual, foundation, and corporate gifts)

Fundraising Assets

We believe that the "Year of Science" represents our strongest fundraising asset to date. The concept will help significantly with activating institutional funders. Additional development infrastructure is already in place as first fundraising collaterals have been finalized in June 2015 and are ready for use.

Foundations

Although we haven't made an official request yet, we have presented the "Year of Science" idea to a larger foundation with a strong interest in science communication. As a value-add, we now have a proposal outline that we can immediately send to other foundations if our first pitch falls through.

Corporate

We have already identified and begun the cultivation process with a potential major corporate funder. As required, we will identify other funders based on alignment with "Year of Science" objectives and audiences served.

Individuals

As a result of our strategic planning process, the board has committed to adding additional fundraising resources. Having our board aid with lead generation will help broaden our reach among potential individual donors.

Table 8: Revenue Forecast for FY 2015–16

	Amount
Anonymous individual donor, 2nd year	$500,000
Stanton Foundation, 2nd year	$1,100,000
Stanton Foundation, additional tech budget	$100,000
New foundation grants	$1,400,000
New corporate grants	$500,000
New individuals	$100,000
Total	$3,700,000

Expenses

A significant percentage of our budget comes from the Year of Science funding. While we are confident that we will receive the funding as planned, we set an internal stage-gate for September 30, 2015. Except for two positions, our hiring will start after the stage-gate, which will enable us to adjust the hiring timeline based on the results of our fundraising efforts. If, by the end of September 2015, we will not meet our fundraising goals for the Year of Science, we will provide an adjusted spending plan that takes into account the delay or loss of this expected revenue. That plan will be presented to the board at its October meeting. Importantly, our work in Digital Infrastructure (the second programmatic focus this fiscal year) will continue regardless of Year of Science funding, as it is key to our long-term strategy of scaling our Classroom Program.

Table 9: 2015–16 Plan Revenue and Expenses

	2015–16 Plan
Revenue	$3,700K
Expenses:	$3,679K
General and Administrative	$791K
Governance	$111K
Fundraising	$310K
Programs	$457K
Programs Support	$1,628K
Program Innovation, Analytics, and Research	$382K

Staffing

The 2015–16 plan calls for adding six full-time positions and one half-time position to the Wiki Education Foundation's headcount. We will also move two half-time positions to full-time positions. Staffing investments follow our emphasis on programmatic work, with the majority of positions filled in programs.

Figure 2: Staffing by Functional Area (Headcount)

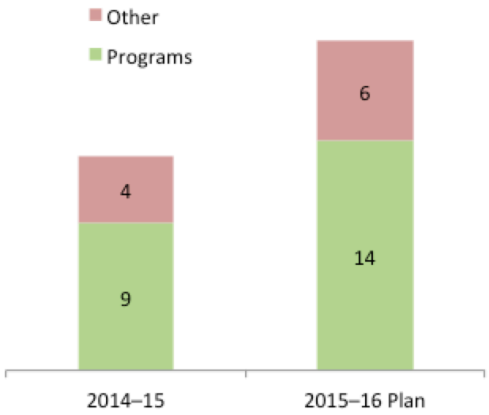
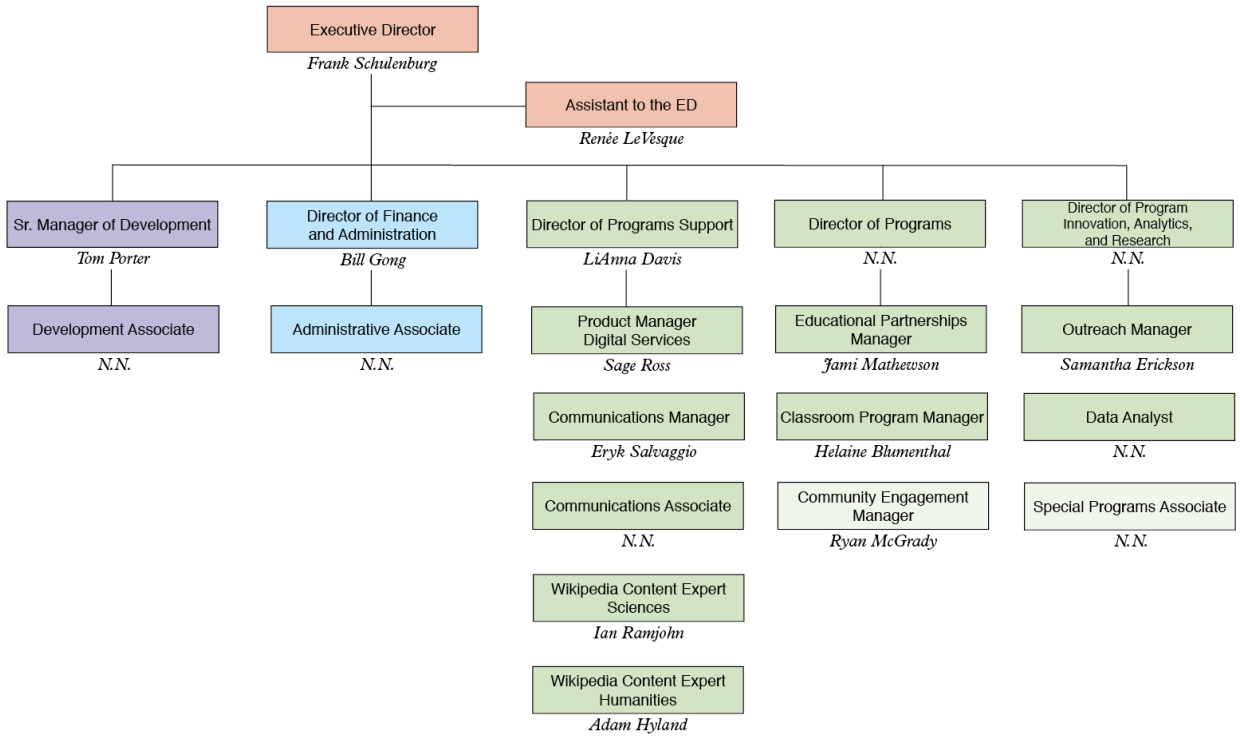


Figure 3: Organizational chart FY 2015–16



Board Resolution

RESOLVED, that the Board of Trustees hereby approves management's proposed 2015–16 annual plan, which includes $3,700K of revenues, $3,679K of spending. If, during the year, management anticipates the spending at each quarter-end will differ materially from the plan, the Board directs management to consult the Treasurer and the Chair of the Audit Committee promptly. Reference: Management's currently anticipated quarterly breakdown of this approved annual plan.

Table 10: Quarterly Breakdown of the Annual Plan Financials 2015–16

2015–16 Plan	Q1 (Jul.–Sep.)	Q2 (Oct.–Dec.)	Q3 (Jan.–Mar.)	Q4 (Apr.–Jun.)	Total
Operating Cash [1]	$1,239,179 [2]	$897,187	$1,392,875	$652,902	
Cash Revenues [3]	$500,000	$1,525,000	$170,000	$305,000	$2,500,000
Cash Spending	$841,992	$1,029,312	$909,973	$897,970	$3,679,247

[1] As of the beginning of the quarter.
[2] Operating cash available at the beginning of the year (July 1) is based on projected expenditures and funds already received from Stanton for FY 2015–16.
[3] Anticipated/projected revenue.

⋆ ⋆ ⋆

Appendix

Risks Considered in Developing 2015–16 Plan

1. Fundraising goals are not met.

The fundraising budget will increase next fiscal year by $2 million to $3.7 million. To mitigate the risk associated with this aggressive increase, we are building a comprehensive development program to focus on three key prospect groups: major gifts from foundations, corporations, and individuals. The highly attractive "Year of Science" theme will help us meet our goals by creating a powerful new engagement opportunity for key fundraising prospects. As of June 2015, we have already identified and engaged two primary funding prospects that, if successful, will satisfy our 2015–16 revenue goals.

We will work closely with the board to broaden our reach, aid with lead generation, and leverage existing relationships. Additionally, the expansion of the leadership team will provide the Executive Director with the opportunity to work closely with the Senior Manager of Development and key prospects to ensure goals are met.

The organization will further mitigate the risk of fundraising performance by timing increases in expenditures with fundraising successes. While we fully believe we will receive the funding as planned, we have an internal stage-gate for September 30, 2015. If the funding is delayed or falls through, we will revise expenditures that take into account the delay or loss of this expected revenue, which will be presented to the Board at its October 2015 meeting.

2. Hiring for key positions fails or takes significantly longer than expected.

Next fiscal year, we will expand our leadership team and hire for two key positions. One of these two key positions will be a new Director of Programs. We know from past experience that leadership positions in the programs area are extremely difficult to fill. Many candidates are not up for dealing with Wikipedia's specific culture or are challenged by the complexity of the work. Others, who could possibly do the job, aren't a good cultural fit.

With the second key position (Director of Program Innovation, Analysis, and Research) requiring skills that are currently in high demand in the San Francisco Bay Area, Wiki Education Foundation will have to compete with high profile tech companies like Google, Facebook, Adobe, and Twitter for best talent.

By working with recruiters specializing in nonprofit executive searches, we will reduce the risk of not finding qualified candidates or not being able to fill the positions in time. By allocating sufficient funds in our budget, we ensure that we will be able to attract and hire senior candidates.