Wiki Education

2019–20 Annual Plan

Table of Contents

Looking back: 2018–19

A Year in Review

Fiscal year 2018–19 has been a time of change for Wiki Education. After completing our year-long strategic planning process in June 2018, the organization started executing against its new three-year strategy.

Figure 1. Wiki Education Strategy for 2018–2020

With Wiki Education bringing 19% of new contributors to the English Wikipedia (or 9% of all new contributors in all Wikimedia projects globally), our organization has become the world-leader in encouraging and empowering people to share their knowledge with others. The work of Wiki Education has had a profound and transformative impact on English Wikipedia; in one month alone, we introduced more new editors to Wikipedia than every other source combined (see figure 2 below). For years, a major focus of the Wikimedia Foundation and its affiliates has been on bringing in new editors; Wiki Education takes particular pride in our efforts over multiple years to demonstrate impact on the new editor numbers at scale. We're also happy to report that all of this has been achieved by continuously improving our programmatic effectiveness while keeping the team size approximately the same as when we started our organization.

Figure 2. New editor sources on English Wikipedia (source: Wikimedia Foundation)
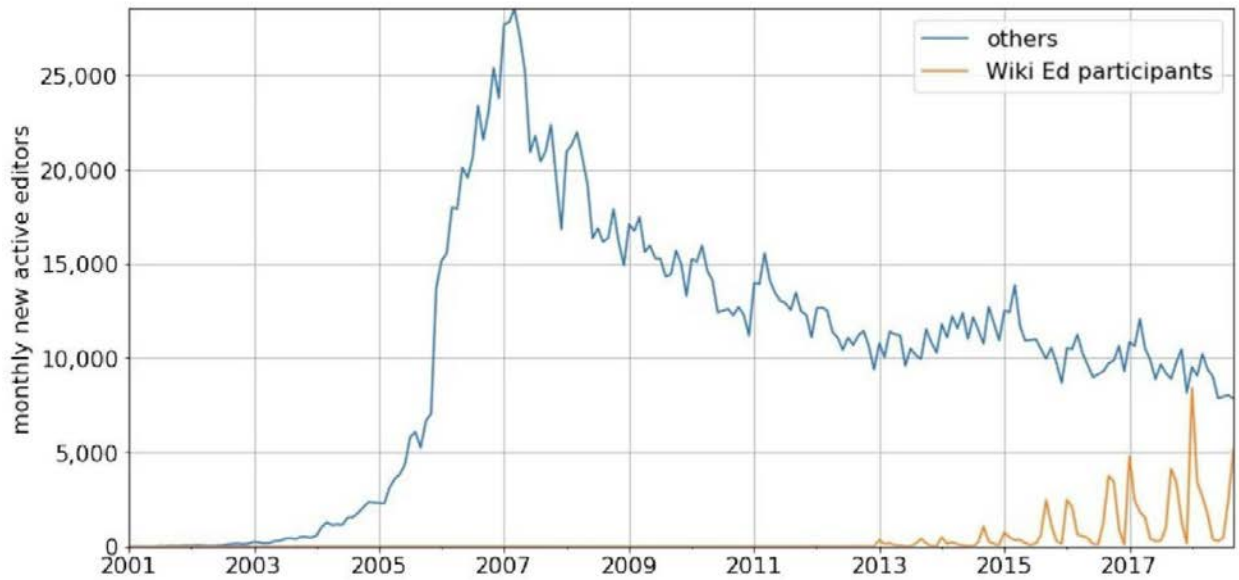
Setting Wiki Education on a path of sustained growth for the coming years has been one of the centerpieces of our new strategy. In 2018–19, we embarked on achieving greater financial sustainability by creating earned income through professional development courses. After analyzing the different options, we decided to keep our Student Program free of charge and instead create a fee-for-service model for our new Scholars & Scientists Program, beginning in November 2018. With hundreds of academic experts having participated in this program to date, Wiki Education became the first organization in the Wikimedia universe to create a model for generating revenue through dedicated support for new Wikipedia contributors.

Besides improving Wiki Education's chances for growth in the long term, our Scholars & Scientists Program fulfills a long-standing dream: it took more than a decade from the first "Wikipedia Academy" event that started the dialogue between Wikipedia and the academic world in 2006 until 2018 to find a scalable and effective way of empowering academics to contribute to Wikipedia. In our Scholars & Scientists Program, established academics participate in an online course that enables them to systematically assess Wikipedia's shortcomings and then significantly improve high-profile articles for the benefit of millions of readers in the United States, Canada, and other English-speaking parts of the world.

Figure 3. Wiki Scholars participants in our "Women in Science" course held remotely through video-conferencing software (according to survey data from 2018, 78% of participants in our Scholars & Scientists courses identify as non-male)

The cooperation with the U.S. National Archives in Washington D.C. we started in November 2018 is a prime example of how our Scholars & Scientists Program can change Wikipedia for the better, while also bringing more women as contributors to the world's biggest encyclopedia. In preparation for the 2019 exhibit *Rightfully Hers: American Women and the Vote* which celebrates the 100th anniversary of women voting rights in the United States, four cohorts of renowned scholars, most of them women, critically analyzed Wikipedia's content in the topic area of the women's suffrage movement, revised key articles, and created missing ones. Expressing his support for this project, David Ferriero, Archivist of the United States, said: "For scholars with a passion for American history, this presents a chance to improve the content of Wikipedia and make it more representative, accurate, and complete […]." Today, we're looking forward to creating more collaborations of this kind in order to cultivate academic participation in Wikipedia for the benefit of all.

Our *Communicating Science* initiative has been one of the pillars of Wiki Education's programmatic work since we made 2016 the "Wikipedia Year of Science". Generous support from the Moore Foundation

and the Heising-Simons Foundation allowed us to expand our work in this area in fiscal year 2018–19. Despite Wiki Education's past successes in improving the coverage and quality of science-related articles on Wikipedia, the encyclopedia's STEM content still lags behind content in other topic areas. Yet, our established Student Program succeeded in bringing several thousands of highly motivated new content contributors to Wikipedia in 2018–19 alone. These students improved an astonishing number of science-related articles, while also learning how to educate a broad public audience about complex scientific topics in a clear and easy to understand way.

Analysis of our workflows and the search for potential efficiency gains has been paving the way for Wiki Education's dramatic increase in impact over the past couple of years. In order to make our programs scale even further, in early 2019, we conducted another deep-dive at how we execute programs and created an updated version of our process map for different programmatic activities.

Figure 4. Staff during an exercise to update our process map in February 2019

As a result, we came up with a list of improvements that will enable us to grow our impact without hiring new staff. One of the findings led us to replace a third-party software solution with our own ticketing system built directly into our Dashboard software. Instead of switching back between different applications, our programs support staff is now able to deal with the help requests from participants in our Student Program in a much more efficient way.

While our Dashboard is a centerpiece of how we can manage tens of thousands of participants in our own programs, our strategic plan also called for increasing support for the "Programs & Events Dashboard", a pro-bono version of our software supporting volunteer-led programmatic activities around the world. Over the last year, the Programs & Events Dashboard was used by more than 15,000 editors, tracking more than 2,000 courses, edit-a-thons, and other projects – powering editing campaigns like *Art+Feminism*, *#1lib1ref*, and much more. In fiscal year 2018–19, Wiki Education staff attended the *Wikimedia+Education* conference in San Sebastián and the *Wikimedia Hackathon 2019* (which featured our software as one of its focus areas) in Prague. Both events allowed us to get a better picture of the needs of Wikimedians who use the Programs and Events Dashboard for running programs that increase knowledge equity in different parts of the globe. The insights we gained at these events will help inform our tech team's work in the coming year.

Overall, we're extremely proud of what we've achieved only one year into carrying out our new strategic plan. In year one we've laid the foundation for the work ahead of us and we're confidently looking forward to the next two years. The high level of staff commitment to our strategy is reflected in our daily work and confirms that we're on a very good path into the future. Yet, all of this would not have been possible without the continuing trust of our funders, the power of our board and staff working hand in hand, our healthy relationship with the community of Wikimedia volunteers, and the many people engaged in our programs.

Programs

Programs underwent a significant shift this year: With the launch of the fee-for-service model in our Scholars & Scientists program, we shifted our initial plan from growing the Student Program to growing our revenue model instead, in an effort to solidify the financial footing of the organization so we can continue to scale our programs in the future. As this model has already begun to pay dividends for our organization, we firmly believe it was the right approach, but it did cause our Programs team to shift goals mid-fiscal year. To support our new professional development offerings, we shifted staff resources from recruiting faculty for the Student Program to recruiting participants in our Scholars & Scientists courses. We are pleased that because of the investments we've made in our programs, we continue to be the largest programmatic driver of new editors to the English Wikipedia, adding significant percentages of new content in key topic areas, including equity-related topics and science.

Educational Partnerships and Outreach

Goal: Establish partnerships with educational institutions to help achieve strategy of improving Wikimedia content's reach, equity, and quality
This year, we expanded our definition of 'partnerships' to include organizations that sponsor Scholars & Scientists courses, which brings experts to Wikipedia to add high-quality information to articles with a large readership. In October 2018, we began to collaborate with the National Archives and Records Administration on a year-long project to improve Wikipedia's coverage of women's suffrage. We also signed an agreement with the Society for Family Planning to add science-based information about family planning topics to Wikipedia, and we have ongoing conversations with many more organizations to sponsor additional Scholars & Scientists courses.

We started a traditional partnership with the Conference on College Composition and Communication, an academic association for composition instructors. We will support their members as they join the Student Program and will look for opportunities to run a Wiki Scholars course together.

Goal: Recruit program participants for all programs, focusing on Wiki Education campaigns and initiatives
After seeing early success with the Wikipedia Fellows pilot in spring 2018, we expanded the program throughout the year. We also recruited many new courses for our Student Program, with a focus on bringing in courses related to equity and from our Communicating Science initiative.

Goal: Develop a model to encourage cross-program participation
Together, the Advancement Team and the Programs Team developed a model for encouraging cross-program participation. The goal is to recruit Scholars & Scientists alumni into the Student Program, and vice versa. We have executed this by: specifically asking participants in one program to join the other; including follow-up permission via surveys; asking top performers to amplify their impact; and giving Program Managers the opportunity to speak to other participants.

Student Program

Goal: Deepen instructor interaction and retention for high-quality courses
The strategy to retain high-quality courses by deepening the involvement of instructors in the Student Program is an ongoing goal, but we made great strides this year. Activities included work on our instructor survey, office hours, and course quality assessment. We hope revamping our instructor survey will yield meaningful and actionable results. We've tried several different approaches over the past several years to more fully engage instructors, but hopefully the survey data will tell us more about what truly motivates program participants. We decided to discontinue Office Hours due to low attendance, likely due to a combination of disinterest and scheduling challenges. As a result, we will seek other ways to engage instructors and provide them with the support they need. We also refined the equation we use to assess the quality of courses to more specifically pinpoint the highest quality courses to focus our attention on retaining.

Goal: Engage instructor focus group at WikiConference North America
We organized a focus group for instructors attending Wiki Con 2018. There were ten instructors in attendance for a two hour session in which we learned what made this particular group of instructors both successful and engaged in the Student Program. We've used learnings from this focus group to work on our goal of deepening instructor interaction as described in the prior goal as well as in next year's plan.

Goal: Plan for a new pilot program to encourage students to contribute content to Wikidata as a class assignment
In spring 2019, Wiki Education staff began the preparation phase for a Wikidata for librarians course in our professional development suite of offerings, as we found this to be the most fruitful starting point. Staff attended conferences, developed marketing material, conducted market research, and networked with practitioners in the field in preparation for a FY19–20 launch.

Wikipedia Fellows Program

Goal: Determine the highest impact model for scaling the Wikipedia Fellows Program
In summer and fall 2018, we tested course variables (such as length of course, number of participants, topic areas, etc.) across 11 separate courses. In March 2019, we published an evaluation update, following up on our extensive pilot report. With the lessons learned from the pilot and our summer cohorts, we took the Wikipedia Fellows program in a new and exciting direction starting in fall 2018 with the launch of our Scholars & Scientists program. We have run four courses in association with NARA to train academics and professionals to improve Wikipedia articles related to women's suffrage before and in tandem with their exhibition on the 19th Amendment, one advanced course for NARA course alumni, and one course devoted to our Communicating Science initiative. We also started three additional courses at the end of the fiscal year.

Visiting Scholars Program

Goal: Switch Visiting Scholars program to reactive mode
We continued to provide support for scholars and institutions participating in the program, several of whom renewed their relationships this fiscal year, and continued to engage with new scholars and institutions who reached out to us with interest in participating, but we did not actively recruit new participants. We maintained a small number of highly capable Visiting Scholars through staff time amounting to less than a half-day per week. A total of nine Visiting Scholars were active for at least one month this year. Together, among other achievements, they produced 12 Good or Featured Articles.

Wikipedia Content Experts

Goal: Continue to provide high-quality support for the Classroom Program while expanding support for Wikipedia Fellows Program
2018–19 was our biggest year in terms of total classes supported and numbers of students supported. Our Wikipedia Experts (formerly Wikipedia Content Experts) continued to provide crucial support for the Student Program (formerly the Classroom Program) while supporting the expanded Wiki Scholars & Scientists Program (formerly the Wikipedia Fellows Program). The 2018-2019 fiscal year saw us support the largest number of student editors and the largest number of classes to date. To support expansion of the Scholars & Scientists Program while maintaining our current level of support to the Student Program, we added a third, half-time position to the team in October 2018. Across the two programs, Wikipedia Experts provided advice to new program participants on article selection, made suggestions for how articles might be improved, and provided feedback on drafts. For Wiki Scholars & Scientists,

Wikipedia Experts also provided in-person support during Zoom meetings and in dedicated Slack channels.

Between October 1 and April 1, Wikipedia Experts were able to reply to 95% of the 464 questions received through the Desk ticketing system within 24 hours of receiving the message, one of our measures of success.

Communications

Goal: Provide ongoing communications support for Wiki Education
We published regular blog posts highlighting examples of how Wiki Education staff, participants, and programs are meeting the pillars of our new 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 Wikipedia Fellows and Scholars & Scientists courses also published on our blog, providing an opportunity for post-course reflection for both course participants and staff. Through roundups, we also highlighted student-authored Wikipedia articles of diverse disciplines, with a special emphasis on topics related to our *Communicating Science* initiative. We also increased our focus on Fellows and Wiki Scholars/Scientists-centered stories.

A page on our website for our Scholars & Scientists courses, learn.wikiedu.org, now features current and past opportunities for our courses. Our homepage also now better reflects our current programs and strategy, as well as making it more obvious how site visitors can engage with us depending on their goals and interests.

Goal: Create communications materials to recruit new program participants
We created an outreach postcard about our Student Program to give instructors at conferences. They are more cost-efficient and relevant giveaways than giving discipline-specific brochures to people not yet in our programs. We also adapted the Student Program infographic into a banner for recruitment, as well as creating other banners in support of recruitment for the Scholars & Scientists Program.

Goal: Develop and adapt resources for program participants

We designed and implemented interactive and shareable online certificates for alumni of our Scholars & Scientists courses. Some alumni have since shared their certificates with colleagues and on their LinkedIn profiles. We also adapted our Wikipedia trainings for the professional development course audience.

Targets

Our mid-year shift to pushing the Scholars & Scientists program in a fee-for-service model meant we had slightly less of an outcome than we had originally projected. This can be seen in two areas: (1) in our Student Program, we onboarded fewer courses than anticipated, and this program is a large driver of big content numbers; and (2) in our Scholars & Scientists Program, we had anticipated scaling up the program more significantly when we were offering it free of charge. It is understandable we did not see the same levels of growth when we offered it for a fee, and fewer participants meant less outcome content-wise for Wikipedia.

Table 1. Targets for Programs in fiscal year 2018–19: goals and projected actuals.

Description	Goal	Projected actual	Notes
Number of participants in our Student Program	16,500	16,750	We project we will meet this goal.
Number of Wikipedia articles improved	17,000	16,000	We stopped supporting small projects courses in the Student Program in order to increase the overall quality of contributions, which led to fewer articles being edited.
Number of words added to articles	15 million	13.5 million	The shift in focus of our recruitment team to be on the revenue model meant we brought in ~7% fewer courses overall.

Technology

Goal: Keep Dashboard platforms and other services running
Investments from previous years in system performance and error monitoring led to a very stable year for Wiki Education's sites. The global Programs & Events Dashboard was also relatively stable, although

it required further infrastructure updates to maintain compatibility with the Wikimedia Cloud system that hosts it.

Goal: Provide mentorship to interns and other open source contributors
We continued investing in supporting interns and volunteer open source contributors, and we shipped some particularly important new features this year thanks to these contributors.

Goal: Support program needs through improving the Dashboard
With the addition of Wes Reid to the Technology team in January 2019, our capacity to support program needs increased considerably.

Targets

Table 2. Targets for Technology in fiscal year 2018–19: goals and projected actuals.

Description	Goal	Projected actual	Notes
Uptime for dashboard.wikiedu.org and wikiedu.org	99.5%+	99.9%+	Our main sites had no significant downtime this year.
Continued availability of Programs & Events Dashboard for global use		Complete	Programs & Events Dashboard experienced modest downtime, approximately 12 hours total. With continued maintenance, it should remain stable with current usage patterns.
Successful participation in Google Summer of Code and/or Outreachy in 2018–19		Complete	Internships during Google Summer of Code and two rounds of Outreachy were completed successfully. We also had previous interns return as mentors and as a Google Summer of Code coordinator. We will be working with three more interns in Summer 2019.

Acceptance of code contributions from both new and returning volunteer developers during 2018–19		Complete	The number of contributors to our codebase passed 100, and we continued to see a steady stream of contributions from volunteers.
Complete a process map for all active programs to identify bottlenecks and barriers that may have technical solutions		Complete	We created online process maps for both the Student Program and the Scholars & Scientists Program, which we will continue to update as each program evolves.
Implement the highest-priority technical improvements identified in the process map		Complete	We improved the integration between the Dashboard and Salesforce, added the ability to create students' accounts through the Dashboard, and improved Timeline generation so that we can easily make edits to standard assignments and tasks.

Revenue and Expenses

Revenue

In fiscal year 2018–19, Wiki Education continued to rely on funding from private donors, primarily from major foundations, in our strategic approach called "Selling Impact." We also established a new business model focused on selling professional development courses that has resulted in a small portion of our overall revenue coming in as earned income, through our strategic approach called "Selling Services." We are happy to report that our attempts at diversifying our fundraising streams through Topic

Sponsorships and Fundraising Partnerships were actually boosted by our Selling Services model, as we have been able to use these approaches to sell services with some initial success.

Table 3. Revenue breakdown by quarter, for fiscal year 2018–19.

	Q1	**Q2**	**Q3**	**Q4 [1]**
Revenue Total	$812K	$509K	$500K	$441K
Foundations	$804K	$487K	$469K	$300K
Individuals	$6K	$4K	$6K	$71K
Earned Income	$2K	$18K	$25K	$70K

Notes:
[1]   Projections made based on actuals through May 31, 2019.

Selling Impact

In addition to seeking unrestricted philanthropic funding for our general operating and programmatic expenses, we also sought philanthropic sponsorships for specific topics and attempted to secure funding from new funders by leveraging relationships with other non-profit, grant-seeking organizations.

Topic Sponsorships

We aimed to secure $200K in topic sponsorships, with the goal of attracting new funders by offering to support improvement of content on Wikipedia in topic areas of particular interest to the funders themselves. We quickly learned through conversations with several major funders that our Student Program was not an ideal context in which to sell topic sponsorships, because our Student Program is not designed to target content areas on Wikipedia at the level of specificity that funders are interested in (e.g., we can target "biology" easily, but not "species of birds"). We could not guarantee to these funders specific contribution goals because we don't have the level of detailed control over student work that would be necessary to set and achieve these kinds of targets.

While we determined to abandon our Topic Sponsorship approach as a significant means of funding our Student Program, it quickly became clear that this type of content-specific approach is very attractive within the context of our Scholars & Scientists program. In this program we are, in fact, able to target very specific topic areas. This means we are able to set targets for improving coverage of certain content

on Wikipedia that is of interest to funders. In the first month of the fiscal year, a funder reached out to us with interest in improving content on Wikipedia related to the Women's Suffrage movement in the United States and provided a $70K grant. Improving content about this topic through our Student Program would be quite difficult, if not impossible, but through our Scholars and Scientists program became very straightforward. We partnered with the United States National Archives and Records Administration (NARA) and have successfully supported nearly 40 historians and other interested scholars to make significant improvements to Wikipedia on the women's suffrage movement in America. Over the course of the year, we have engaged with several other funders who are interested in this approach, with several actively considering providing funding to support Scholars and Scientists courses on topics they care about.

Fundraising Partnerships

In this strategic approach, we aimed to secure funding from foundations outside our current network by formally partnering with other non-profit, grant-seeking organizations whose interests overlap significantly with the impact Wiki Education achieves in those interest areas. Our goal for the year was to establish three partnerships. We found this approach to be more difficult than expected, especially for finding support for our Student Program where it is hard to target specific content areas of interest to other organizations. While we did work with Wayne State University to submit a grant proposal to the Institute for Library and Museum Services, we were not successful in obtaining any new funding for our work through this approach.

As we have progressed to build out our business model, we have found that many organizations, including libraries, museums and archives, are very interested in working together to find funding to support Wiki Scholars and Scientists courses. We have had meaningful conversations with several organizations about new potential funding opportunities.

Selling Services

Our goal for the year was to secure sufficient funding to allow us to hire a consulting firm to help us explore various potential fee-for-service models. We raised $50K for this purpose and worked with an outside consultant.

In August, we started investigating the market landscape for a fee-for-service model that would allow us to run and scale the Wikipedia Fellows pilot. The consultant conducted a survey of past participants and

Student Program instructors, as well as interviews with decision makers in higher education. This research provided us with valuable information regarding the desirability and price point for a professional development course that teaches academics how to contribute high-quality content to Wikipedia.

Simultaneously, we had an opportunity to collaborate with NARA to align our virtual course with the topic of their 2019 museum exhibit about women's suffrage. We took the opportunity to move forward with our efforts to sell services in practice rather than in theory. We rebranded the Wikipedia Fellows pilot – now the Scholars & Scientists program – and launched the first of the funding models we developed, in which individuals pay a tuition fee to cover the cost of their training, in collaboration with NARA. We have since pursued three funding models and have been exploring their marketability:

- Individual Payer: Wiki Education offers a Scholars & Scientists course to train experts how to contribute to Wikipedia. Participants pay a tuition fee for a 3-month course, potentially through employer funding or broader impact grant requirements.
- Institutional Payer: Wiki Education contracts directly with institutions to provide funding for a course or other program offerings. Wiki Education contracts with universities, GLAM institutions, academic associations, and other organizations interested in improving the public's access to reliable information.
- Funder-assisted: Some organizations will not be able to fully fund the program they're interested in. Wiki Education works with them to explore additional funding through their network or through grants that Wiki Education is unlikely to receive without their partnering support. This helps reduce the cost of a course so that individuals pay a smaller tuition fee or institutions pay a smaller contract fee, helping Wiki Education achieve its equity goals by inviting participants from institutions with less access to funds.

We have begun investigating how well these models work within higher education or with other knowledge institutions. By developing contracts to scale this program, our goal has been to develop a business solution that will generate enough revenue to sustain the Scholars & Scientists work while simultaneously bringing expertise to high-value Wikipedia articles.

Targets

Table 4. Revenue targets for fiscal year 2017–18: goals and projected actuals.

Goal	Projected actual	Notes
Add at least one new institutional or individual funder at a level of $200K or above in our general operating support revenue stream	Not complete	No new general operating support funders added. Conversations with several potential funders continue.
Add at least one new institutional or individual funder at a level of $200K or above in our *Communicating Science* revenue stream	Complete	We secured a $485K grant from the Moore Foundation in November 2018.
Add at least one new institutional or individual funder at a level of $250K or above to support our Wikidata Pilot project	Not complete	We continue to be engaged in conversations with several potential funders.
Generate two new topic sponsorships, totaling $100K	Approach shifted	We shifted the Topic Sponsorship approach to Selling Services as part of the funder-assisted model. We secured $70K from one funder to sponsor Wiki Scholars courses with the National Archives and Record Administration
Establish fundraising partnerships with three organizations and acquire funding for proposed projects with at least two of these partners, totaling $225K	Approach shifted	We shifted the Fundraising Partnership approach to Selling Services as part of the funder-assisted model. No partners have helped secure funding for courses yet, though we continue conversations.

Successfully acquire renewal funding from the Wikimedia Foundation	Complete	We secured an Annual Planning Grant renewal at the $400K level.
Maintain a positive relationship with our existing funders, resulting in at least two renewals of existing grants at increased funding levels or increased grant terms	Complete	We secured renewal grants from the Hewlett Foundation and the Heising-Simons Foundation, both at increased levels.
Generate an additional $110K in philanthropic funding to support the exploration and development of a business model for selling services	Complete	We secured an Organizational Effectiveness grant from the Hewlett Foundation and increased general operating support to cover this expense.
Begin implementation of a *Selling Services* business model to generate at least $20K in revenue	Complete	We developed and implemented a new business model, resulting in $90K in earned revenue (projected).
Maintain 100% board giving and continue working closely with our Development Committee, especially in the area of *Topic Sponsorships*	Complete	We secured cash or in-kind donations from all board members.

Expenses

Our plan for fiscal year 2018–19 called for total expenditure of $2,418K. In Q1 and Q2, we decided to be more conservative in our spending, which played out well in the end, given that we didn't hit all our revenue goals (although our revenue for fiscal year 2018–19 already surpassed last year's revenue in Q3). We also didn't hire for a business developer position budgeted in Q4 and spent the money instead on increased capacity in Programs which allowed us to prepare our new "Wikidata for Librarians" course

offering, scheduled for roll-out in July 2019. Spendings in Programs, Technology, and General & Administrative categories were slightly under what we had budgeted. Our most significant savings were achieved in the Advancement category, after we decided to keep most of the development of our "Selling Services" model in-house instead of working with additional outside consultants. 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 5. 2018–19 Financials: Plan vs. Projection

	2018–19 Plan	**2018–19 Projection [1]**	**Variance projection vs. plan**
Revenue	$2,810K	$2,262K	-20%
Expenses	$2,418K	$2,140K	-12%

Notes:
[1]   Projections made based on actuals through May 31, 2019.

Human Resources

Staffing

During fiscal year 2018–19, we increased our organization's capacity in three areas that we identified as critical for fulfilling the vision as set forth in our new 3-year strategic plan. We added a half-time Wikipedia Expert position to provide better support for program participants while we're scaling our programs. We created new capacity in project management and structured data so we'd be able to offer Wikidata courses at the beginning of the following fiscal year. We also hired our first software developer in order to manage the needs of a rapidly growing community of Dashboard users. At the same time, we held off hiring for positions that we couldn't acquire sufficient long-term funding for (see table 6).

Table 6. 2018–19 Staffing: Plan vs. Projection

	2018–19 Plan	**2018–19 Actual**	**Variance from plan**
Staffing	16 FTE	14 ½ FTE	- 9%

In October 2018, we welcomed Elysia Webb as half-time Wikipedia Expert. Elysia, a Wikipedia Student Program alumnae, now supports both Wikipedia Student Program and Scholars & Scientists Program alongside Ian Ramjohn and Shalor Toncray. Elysia resides in Ohio.

Also in October, Ryan McGrady returned from his 6 month leave. Upon Ryan's return Will Kent transitioned from his interim role to his new permanent role as Wikidata Program Manager. Will works at our San Francisco office.

Figure 5. Staff photo in February 2019

This year we also welcomed Wiki Education's first software developer, Wes Reid, in January. Wes has several years of experience as a software developer and trainer in non-profit organizations. Originally from the Bay Area, Wes currently lives in Seattle. As a small team of two in our technology department, his current location allows Wes and Sage Ross, Chief Technology Officer, to collaborate face-to-face, and within their mutual community.

Fiscal year 2018–19 was also the year we fully experienced the benefits of our new parental leave policy with LiAnna Davis and TJ Bliss being on new parent leaves to bond with their respective newborns. In both cases, Frank Schulenburg filled in for the duration of the leave.

The smooth handling of these two parental leaves and the major benefits that LiAnna, TJ, and their families got out of our new policy strengthened our belief that even small organizations like ours can live up to the standards that people in most other countries of the world can take for granted.

Organizational restructuring

In order to be fully equipped to reach the objectives in our strategic plan, we made a number of changes to how Wiki Education is structured (see figure 6). The Programs department runs our Wikipedia Student Program (formerly named "Classroom Program") as well as our new Wiki Scholars & Scientists Program. The new Advancement department is responsible for revenue generation through institutional donors, earned income, and partnerships. The new Technology department plays a key role for our programmatic offerings, and also provides technical support on the operational level.

Figure 6. New organizational structure by functional area (presentation slide created for the roll-out of the reorganization in October 2018)
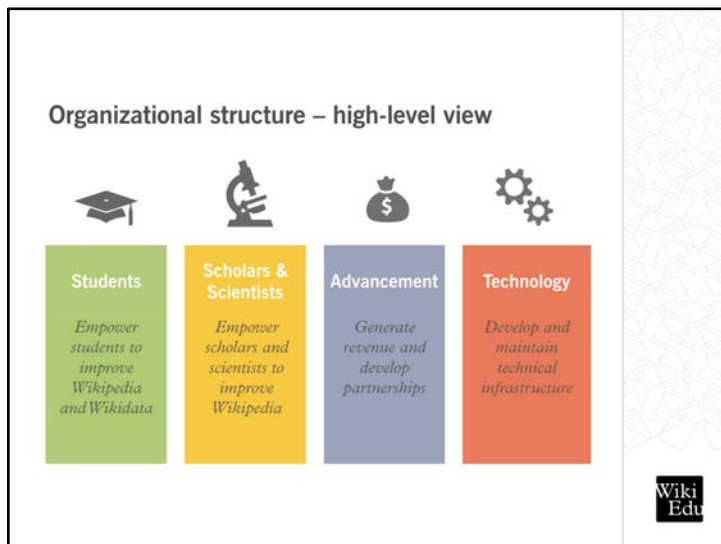
The new organizational structure went into effect at the beginning of Q2 of fiscal year 2018–19. As this reorganization was the biggest structural change since the start of Wiki Education in 2014, we spent a significant amount of energy on creating alignment around the changes among staff and making adjustments based on the feedback we received during this process. In the months following the reorganization, we provided additional professional development to those staff members whose roles had been affected the most by the changes.

Looking ahead: the 2019–20 Plan

Key Initiatives in 2019–20

Wikidata

In July 2019, we will launch our first Wikidata courses as part of our professional development suite of offerings. Through both in-person and online courses, we will train professionals in how to understand, contribute to, and query Wikidata, the structured open data project in the Wikimedia umbrella. We look forward to expanding our programmatic offerings to the Wikidata.

Communicating Science

Science content remains a focus of Wiki Education's programmatic work. Through supporting courses in both our Student Program and Wiki Scholars & Scientists Program related to the sciences, we will improve the availability of scientific information for the general public.

Student Program user experience

In our effort to further increase the efficiency of our programs, we'll make significant improvements to the Dashboard user experience for students and for instructors so that fewer students require Wikipedia Expert intervention and more instructors recruit colleagues. We will design better scaffolding so that students know exactly what they need to do at each step of an article-writing assignment, and we will create better tools for reviewing and grading the individual exercises and assignments that comprise a Wikipedia classroom project.

Selling Services

We will continue to develop our earned revenue model, focused on providing professional development related to Wikipedia and Wikidata. We will work to create flexible course offerings that meet the needs of our partners and individual participants and that improve the quality, equity, and reach of open knowledge.

Programs

Wikipedia Student Program

Goal: Expand impact of Communicating Science Initiative

Our *Communicating Science* initiative remains a key focus area this year, and the Wikipedia Student Program is the core program that has impact on science content. We will focus on expanding the impact of the initiative by attending science association conferences to attract new participants, writing blog posts addressing the impact to the sciences, and using our Wikipedia Expert staff expertise in the sciences to speak to the broader science communication community.

Goal: Strengthen and diversify instructor participation

We believe instructor engagement is key to retaining good faculty participants in the Wikipedia Student Program. We will identify modes of engagement instructors find most meaningful, then implement these engagement opportunities. Examples of engagement opportunities include existing practices, such as instructor-written blog posts and conference submissions by instructors about their Wikipedia assignment experiences, as well as new models that may include the development of a mentor-type program and the fostering of communication among program participants. As part of these efforts we will more clearly define the role that instructors play in our programmatic efforts as well as set more clearly laid out expectations for participation in the Student Program. In doing so, we will transform instructors into organizational partners who can serve as advocates and volunteers in our efforts.

Goal: Integrate equity consultant recommendations into resources

In summer 2019, Dr. Alex Lockett of Spelman College – a renowned expert in equity topics – will review Wiki Education's current resources, such as our online training modules, written guides, and assignment design wizard, as they relate to issues of equity. Dr. Lockett will make recommendations on how we can better tackle issues of equity in these tools. We will incorporate her recommendations for the 2019–2020 academic year.

Wiki Scholars & Scientists Program

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

As our Advancement colleagues focus on growing the participation in the Wikipedia wing of the Wiki Scholars & Scientists Program as part of the Selling Services initiative this year, the Programs team will focus on ensuring the program participants receive a meaningful experience. Through ongoing

evaluation and experimentation, we will look for ways to improve the learning outcomes for participants while increasing the scalability of the program. We will experiment with different types of courses, including both introductory courses and advanced courses more narrowly focused on group improvement of high-traffic Wikipedia articles.

Goal: Create Wikidata suite of courses
In July, we will launch 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. After our initial courses with librarians, we will explore extending the model to other target groups, based on where the demand is.

Wikipedia Expert Support

Goal: Provide high-quality support for all program participants
As we expand the Wiki Scholars & Scientists Program and the *Communicating Science* initiative, as well as creating a new Wikidata Program, it will be important to ensure our Wikipedia Expert support remains top-notch. Data from program participants indicates how valuable the help provided by our team of Wikipedia Experts is for ensuring the good experience of paying customers in the Wiki Scholars & Scientists and Wikidata Programs and quality content to Wikipedia from the Student Program.

Program development

Goal: Explore how to measure article quality across different topic areas on Wikipedia
Our strategy calls for the development of a new measurement of article quality assessment within a particular topic area. This fiscal year, we will sponsor a University of Virginia Data Science Institute master's student or students to participate in a Capstone Project to undertake this research.

Stretch Goal: Develop a plan for our future Wikidata Student Program
Pending grant funding in early 2020, we will begin developing a new program to integrate Wikidata into the curriculum of higher education courses, with a target start date of fall 2020. While we will not have outcomes for the Wikidata Student Program this fiscal year, we will undertake work to plan for the program.

Stretch Goal: Develop a plan for a Women in Science biographies contest
Pending grant funding in early 2020, we will begin developing a new program that's a hybrid of the *Wikicup* and the *Art+Feminism* campaign, in which universities will gain points from amount of content,

references, and images added to Wikipedia biographies of women scientists. The contest is slated for fall 2020, but we will begin the planning and development phase of the program in this fiscal year.

Targets

- 16,000 program participants across Wikipedia Student Program and Wiki Scholars & Scientists Program
- 16,000 Wikipedia articles edited from Wikipedia Student Program and Wiki Scholars & Scientists Program
- 14 million words of content added to Wikipedia from Wikipedia Student Program and Wiki Scholars & Scientists Program
- 1,000 Wikidata items improved from Wikidata courses
- 10,000 Wikidata statements added from Wikidata courses

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 Salesforce system, our WordPress website, and payment processing infrastructure for the Wiki Scholars & Scientists program. 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 Programs and Advancement teams
- 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.

Goal: Improve the Dashboard's support for the stages of students' article writing assignments

The Dashboard provides students with detailed training modules that cover the most important steps in a Wikipedia article writing assignment. But beyond the course timelines that break this process up into discrete assignments and exercises, the Dashboard provides no scaffolding for the typical stages of a student's article project: selecting an article, building a bibliography, drafting an initial version, providing

and responding to peer feedback, moving from a sandbox to mainspace, and continuing the writing and revision process on the live article. Adding this scaffolding will address the most common help requests that Wikipedia Experts supporting the Student Program receive, and will give us an opportunity to present the right material and advice for the task at hand, throughout the semester.

By the start of the Spring 2020 term, we will integrate these assignment stages into the Dashboard's student user experience and monitoring system, so that the Dashboard will:
- point students to a distinct, well-named sandbox page for each task;
- facilitate the research and bibliography-building stage of an assignment;
- track the individual or shared sandboxes where students work during the draft stage;
- provide a framework for the peer review process and keep track of peer review contributions for easy viewing by both peers and instructor; and
- automate the transition from userspace/draftspace into mainspace, both for sections and for new articles.

This work will help our Wikipedia Experts support more courses with fewer help requests related to sandbox drafts, peer reviews, and moving into mainspace. It will let students focus more of their time on research and writing process, with more timely and contextual help from the Dashboard – potentially improving the quality of their contributions. It also lays the groundwork for key improvements for the instructor user experience: once the Dashboard can track which edits and pages are part of which stage of the writing project, we can build features that let instructors view and grade the discrete assignments and exercises.

Targets
- Scaffolding and tracking of writing assignment stages launched by the start of Spring 2020 term
- Conduct user tests and make iterative improvements during the Spring 2020 term

Goal: Further improve the user experience for instructors evaluating their students' work
We know from surveys, focus groups and user tests that "evaluation and grading" is the biggest missing piece of the Dashboard user experience for instructors. Our assignment timelines and grading rubric turn a Wikipedia writing assignment into discrete set of tasks and clear grading criteria for each task, but it's not easy to find the work to evaluate except for the final state of the article. (Our *Authorship Highlighting* feature annotates the final article with details of which was added by which student.) Frequent questions to Wikipedia Experts include how to tell if the 'evaluate an article' assignment was completed, where to find draft work, where to find the peer reviews each student completed, and when the work for each assignment was completed.

Building on the "assignment stages" work that we will launch before Spring 2020, we will focus during the Spring term on improvements to how the Dashboard supports the grading process. We will design and build a grading workflow, which will allow an instructor to go through each student in the course one by one and evaluate either an individual exercise or the entire set of assignments at once. User testing of our initial grading features will also help identify priorities for further grading-related improvements – including possible integration with common learning management systems that instructors use to record student grades. We expect this work to contribute to instructor retention.

Targets
- 'Grading mode' features ready for testing during Spring 2020 term
- Conduct user tests and make iterative improvements, for full release of grading features for all Summer 2020 and later courses

Goal: Support the global Wikimedia community's use of Programs & Events Dashboard
The Programs & Events Dashboard is a flexible, specially configured version of the Dashboard running on a separate server. Over the last year, it has seen accelerating usage. We will continue to support it by designing new features in ways that can benefit users of both Dashboards. We will also improve the Programs & Events Dashboard's user experience and flexibility for global users, with a likely focus on programs beyond English Wikipedia and cross-wiki programs that span multiple languages or projects. We plan to make it easier and more intuitive to track edits to more than one wiki, and to track only the content users want, especially for programs like edit-a-thons that mix new and experienced editors.

Our Programs & Events Dashboard targets are intentionally flexible. We want to respond to the needs of the global community, despite our limited capacity for large-scale consultation and community management. As we did last year, we will keep the product management process for Programs & Events

Dashboard features and priorities an informal and lightweight one. We expect to continue collaborating with Wikimedia Foundation's Community Engagement for organizing technical support and feature requests. We also hope to work with the newly-approved Wikipedia & Education User Group to identify the key technical needs for global education programs, which takes on new importance now that the legacy EducationProgram MediaWiki extension has been removed from Wikipedia and these programs have migrated to Programs & Events Dashboard for tracking courses.

Targets
- Continued availability of Programs & Events Dashboard for global use
- Improve the Dashboard user experience and flexibility for common global use cases

Goal: Improve the maintainability of the Dashboard codebase and the efficiency of development processes
Part of the ongoing work of running the Wiki Education Dashboard is dedicated to ensuring the long-term sustainability of the codebase. As an actively developed piece of software, over time it becomes more powerful, featureful, and tailored to Wiki Education's needs – but also more complex, harder to reason about, and harder to change. To date, it is still largely a fun and easy project to work on and we can implement new features quickly – especially compared, for example, to the far more complex and mature MediaWiki software. We keep it that way by investing time in improving code quality, refining our suite of software tests and deployment and maintenance tools, and documenting the codebase and and its development processes.

We will also focus on improving the communication processes for technical work, so that Dashboard issues and priorities will be clear for the Technology team, other Wiki Education Staff, and volunteer developers and interns. With a larger technical community than in previous years, we need to develop more standardized processes to triage bugs and features requests, to prioritize work that the Technology team plans to complete versus issues open for volunteer contributors, to collaborate with other Wiki Education staff on technical issues and feature development.

Targets
- Reduce the rate of test failures when nothing is broken to 10% or lower
- Maintain 100% test coverage — the portion of code that gets run during tests — for the Ruby code that runs on our servers
- Increase test coverage of our Javascript code that runs in a user's browser to at least 50%, up from 35% currently

- Identify the highest priority barriers in the codebase faced by new developers, and fix or ameliorate those barriers
- Review and improve communication processes for technical work

Stretch Targets
- Simplify the Dashboard's build system by reducing the amount of custom build code and eliminating unnecessary libraries
- Improve the Dashboard's deployment infrastructure to reduce or eliminate the need to manually configure or update server environments

Stretch goal: Support experiments focused on instructor and student engagement
Increasing the portion of instructors who return to participate in our Wikipedia Student Program again is the biggest opportunity we have to continue scaling that program without substantial investments in advertising or recruitment activities. Thinking about instructors through the lens of volunteer engagement, we have several ideas that we'd like to try out, such building Dashboard tools for recognizing good work in a timely and personal way, and providing a platform for instructors to form a social community with each other. Similarly, we're interested in trying out ways of engaging students as volunteers after their Wikipedia assignments are over, such as defining specific self-directed volunteer roles and inviting past students to take them on. While we've never had student retention as a program goal – in large part because students continue editing Wikipedia after their assignments end at such a low rate – it's worth returning to this area periodically to experiment, as the impact of success at student retention is potentially tremendous.

Stretch Targets
- Implement one or more controlled experiment to test ideas for improving instructor engagement
- Implement one or more controlled experiment to test ideas for improving student engagement

Advancement

The newly formed Advancement Team at Wiki Education includes Selling Impact (fundraising) and Selling Services (fee-for-service business offerings), as well as the communications and partnerships work that supports these revenue generating activities.

Selling Impact

Our primary revenue generation strategy will continue to involve seeking major gifts from foundations and other donors who believe in the impact Wiki Education has on student learning and on improved Wikimedia content.

Goal: Raise $2,150K through philanthropic support.
In addition to our primary goal of seeking general operating support, we will also seek funding for our distinct focus areas, which include our Student Program, our *Communicating Science* initiative, and our Wikidata initiative. New funders for these focus areas will be found primarily through a network approach, with existing funders helping secure conversations with like-minded colleagues at other foundations.

To assist in this networking approach, we are planning to hold a Funder Briefing on the East Coast in Q1 or Q2 on the topic "Wikipedia and Philanthropy." This event will be hosted by one of our existing funders, to build awareness among other funders about the importance of Wikipedia to the public understanding of areas they care about. It will also highlight the role Wiki Education plays in improving coverage of these topics on Wikipedia.

Our network approach to fundraising will be augmented with traditional desk-research and cold-call outreach. We will use online tools and databases to help us identify potential funders and develop letters of intent and other materials to help make the case for supporting our work.

Selling Services

As we move into year two of our fee-for-service offerings, we will expand the revenue generated from selling services. Along the way we will explore three different models: (1) Individual Payer, where we offer a specific course and individuals sign up, (2) Institutional Payer, where an institution purchases an entire course for their staff or membership, and (3) Funder-Assisted, a hybrid of the two where an institution supports part of the fees but individuals also pay.

Goal: Develop data-driven approach to projecting revenue from contracts and fee-for-service payments.
The Advancement Team will explore each funding model – Individual Payer, Institutional Payer, Funder-Assisted – and other opportune models that emerge. We will document data about each sales attempt and process. At the end of the fiscal year, our evaluation will aid us in projecting fee-for-service opportunities for the coming year, aiding the organization in the annual planning process.

Goal: Raise at least $257K in earned revenue through contracts and fee-for-service payments.
Through the Individual Payer, Institutional Payer, and Funder-Assisted models, we will generate revenue by offering a variety of professional development course offerings for both Wikipedia and Wikidata. Working with the Programs team, we will collaborate to ensure we are creating offerings that meet the needs of our customers while also covering our organization's costs in offering them and working to support Wikipedia and Wikidata's equity, quality, and reach.

Communications and Partnerships

To support both our Selling Impact and Selling Services work, we will undertake several activities in the communications and partnerships areas in order to achieve our revenue goals.

Goal: Target our communications to ensure we speak to the values of each of our audiences. We will make changes to our website as needed to improve our channels of communication and better differentiate our programmatic offerings to key stakeholder audiences. This work will allow us to craft messaging that speaks to the needs and interests of our diverse audiences, especially in light of our new fee-for-service offerings. When we segment our audiences and messaging, we ensure that relevant information gets to the right people and increases the likelihood of stakeholder engagement with our organization and programs.

Goal: Define a movement that newcomers are compelled to join and share with their networks.
Understanding the values of our target audiences will help us speak to the people who are most likely to engage with and amplify our mission. To identify those values, we will more purposefully measure and track engagement on our social media channels and website. Using analytical tools and strategies, we can determine what aspects of our work are most appealing to each of our audiences. In response to that gathered data, we will adapt our web presence to speak to the "movement" we either create or determine we are a part of (besides the larger "Wikimedia movement," of which we are already a part). Building our communications around where the values of our audiences reflect our mission will strengthen the visibility of our organization.

Goal: Create materials and develop strategies to market course offerings.
We will create promotional materials to best support the goals of our different recruitment strategies. Materials may include one-pagers, banners, and testimonial videos about what Wiki Scholars & Scientists courses provide for the customer and accomplish for public knowledge.

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 reach, equity, and quality in Wikimedia content. We will highlight participant-authored Wikipedia articles related to our strategy and publish testimonials by program participants. We will also feature employee-centered stories as a way to further humanize our organization and further our commitment to organizational transparency.

Goal: Partner with several institutions who consult with Wiki Education in our fee-for-service model.
To reach the revenue goals and experiment with different training models, we will partner with several institutions. Wiki Education will partner with university departments, Centers for Teaching and Learning, academic associations, research institutes, galleries, libraries, archives, museums, etc. that have aligned missions to bring high quality knowledge to the public.

Goal: Assist partners and sponsors in recruiting and onboarding participants for Scholars & Scientists course offerings.
As we work with partners and sponsors, we will ensure that each course meets the minimum enrollment set by the Programs Team. We will host informational workshops and webinars, develop marketing materials for sponsors to distribute to potential participants, attend relevant conferences as needed, and recruit contacts who have indicated an interest in public knowledge or skills development. For each course, we will track recruitment methods, individual applications, payments, and other details, evaluating at the end of each quarter in order to become more efficient and effective in recruitment.

Goal: Experiment with ways to align our course offerings with individual participants' needs and goals.
To make our services more attractive to individual applicants, we will research ways to enhance and adapt our course offerings, building a suite of options that meet various market needs. This might include accrediting our training programs, evaluating the effectiveness of course certificates, and facilitating traditional academic projects like publications and conference presentations.

Targets

As we execute on our goals, the Advancement Team will be working toward the following specific targets in Fiscal Year 2019–20:
- Maintain positive relationships with our existing funders, resulting in renewals of all existing grants at current or increased funding levels.
- Successfully acquire renewal funding from the Wikimedia Foundation.

- Secure an additional $340K in new grants.
- Generate at least $232K in earned revenue through our selling services revenue model.

Stretch Targets

- Secure $250K or more in grants to support our Wikidata Student Program work.
- Secure $450K in new grants in our *Communicating Science* revenue stream.
- Generate $250K in earned revenue through our selling services business model.
- Secure $250K in new grants for general operating support.

Projected Revenue

Our projected revenue, classified by quarter and fundraising component, is detailed in Table 7 below.

Table 7. Projected revenue, by quarter, for fiscal year 2019–20.

	Q1	Q2	Q3	Q4	*TOTAL*
Revenue Total	$822K	$570K	$477K	$538K	*$2,407K*
Selling Impact	$759K	$525K	$416K	$450K	*$2,150K*
Selling Services	$63K	$45K	$61K	$88K	*$257K*

Expenses

For fiscal year 2019–20, we created a budget in which we add to the spending if we generate more revenue than expected (see "Stretch Targets" sections above), rather than one in which we cut expenses if we fall short of our revenue projections. Both revenue and programmatic impact projections follow the principle "under commit and over deliver". In order to reduce our expenses next fiscal year, we'll slightly cut staff hours where we're projecting overcapacity, cut the ED salary, delay our Cost-of-Living Adjustment, and discontinue our scholarships for Wiki Conference North America as well as our Wellness Program. That way, we're projecting 6% reduced expenses compared to what we budgeted last year (2018–19: $2,418K vs. 2019–20: 2,277). The total expenses for fiscal year 2019–20 of $2,277K will be only slightly higher than the $2,262K we raised in fiscal year 2018–19.

Table 8. 2019–20 Plan revenue and expenses

|	**2019–20 Plan**
Revenue	$2,407K
Expenses:	$2,277K
General and Administrative	$189K
Governance	$91K
Advancement [1]	$705K
Programs	$852K
Technology	$440K

Notes:

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

Human Resources

Staffing in FY 2019–20

For fiscal year 2019–20, we will slightly reduce hours in areas where the capacity is not matching our demand.

Figure 7. Staffing by functional area (headcount)
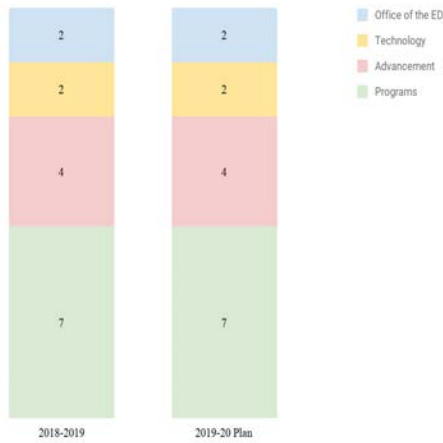
HR Operations

Goal: Increase efficiency in how we approve and track time off and expense reimbursements.

In order to reduce staff time spent on manual time tracking and expense reimbursements, we will start using online tools that are now available through our PEO service TriNet.

- Online expense reimbursement request system through TriNet Expense: This tool will allow employees to keep track of their expenses, compile, and submit their expense reports to their supervisors online or via mobile application. Approved expense reports will then be processed through payroll. This will save time for employees and administrative staff, and allow us to be more green by eliminating paper expense reports.
- Online time off requests and vacation & sick hours tracking through TriNet's time off tool: This tool will allow employees to track their vacation and sick hours online or on their mobile application and request time off directly from their supervisors.

We will start using these tools in Q1, and monitor accuracy of online tracking for one quarter by comparing results with manual tracking. Upon confirming the reliability of the new system, we will no longer perform manual tracking, and paper expense reports as of Q2.

HR Policies

Goal: Adjust organizational policies to recent law changes and to the new programmatic offerings we introduced in fiscal year 2018–19.

From its early days, our organization has been strongly committed to providing a safe and welcoming work environment for all of our employees, contractors, and everyone we support through our programs. Since we introduced Scholars & Scientists Program this fiscal year, our team now facilitates more face-to-face trainings, as well as online trainings with large and diverse groups. Equipping our staff members with necessary *discrimination and harassment prevention training* will help us identify and proactively address any concerns to ensure a friendly collaborating space for everyone involved.

Also, effective January 1, 2019, California requires employers with 5 or more employees (located anywhere) to provide not only two hours of sexual harassment and abusive conduct prevention training to supervisors (including any out-of-state supervisors of California employees) but also at least one hour of such training to all their employees in California.

Goal: Improve the work-life balance of our employees and adjust our vacation policy to the realities of a modern work biography.

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 cares more about. Also, our current vacation policy has employees only reach the highest amount of vacation days after "more than 10 years" of employment, which doesn't seem to be in sync with the realities of companies in the San Francisco Bay Area (we don't want to promise something that people won't be able to reach anyway).

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

Organizational Culture

Goal: Establish a shared understanding of our organization's culture and how all our teams work together successfully.

As we are a small organization and many of our staff members have been with the organization since the early days, we have a shared understanding of our organizational culture. We see the importance and high value of creating an *Organizational Culture Handbook* in order to compile this knowledge in one place and share it with our new employees during their onboarding process. This handbook will also serve as a communication tool to educate employees what they can expect from leadership team, and what is expected of them as a team member.

Targets

- Improve work-life-balance by rolling out a new vacation policy in Q1

- Complete sexual harassment and abusive conduct prevention trainings by the end of Q2.

- Transition from manual time tracking and expense reporting to online time tracking and expense reporting by the end of Q2.

- Hand out new organizational culture handbook ("How we work together") in Q3

Figure 8. Organizational chart for fiscal year 2019–20
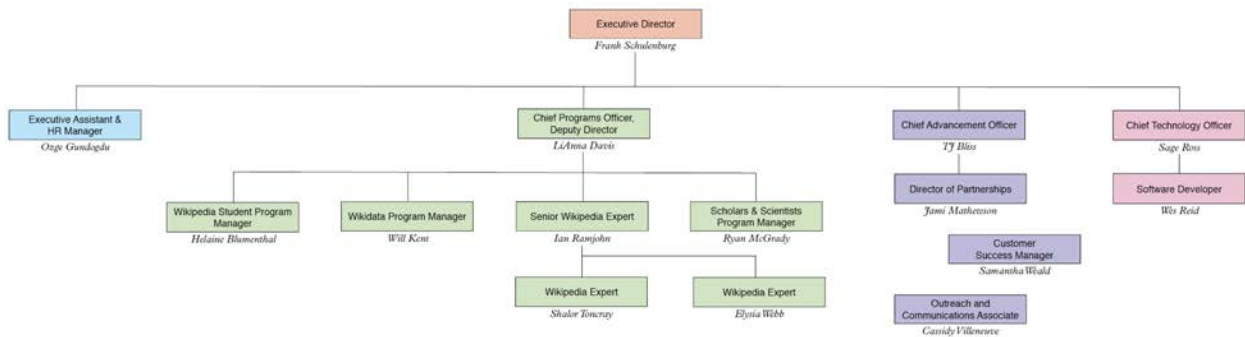
Board Resolution

RESOLVED, that the Board of Trustees hereby approves management's proposed 2019–20 annual plan, which includes $2,407K of revenues, $2,277K 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 9. Quarterly breakdown of the Annual Plan financials 2019–20

2019–20 Plan	Q1 (Jul.–Sep.)	Q2 (Oct.–Dec.)	Q3 (Jan.–Mar.)	Q4 (Apr.–Jun.)	Total
Operating Cash [1]	$267K [2]	$533K	$545K	$428K [4]	
Cash Revenues [3]	$822K	$570K	$477K	$538K	$2,407K
Cash Spending	$555K	$557K	$594K	$571K	$2,277K

Notes:

[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 expected unspent funds carried forward from FY 2018–19.

[3]   Anticipated/projected revenue.

[4]   Anticipated cash of $396K to be available at the start of fiscal year 2020–21.

*   *   *

Appendix

Risks considered in developing the 2019–20 plan

1. The timing of grant allocations create cash flow issues.

While our total expected revenue exceeds our total budgeted expenses for the coming fiscal year, actual grant allocations and payments from our funders do not always align perfectly with the timing of expenses. Mismatches in revenue and expense timing are also complicated by restricted funding, where certain funds are restricted to certain activities. We will work to mitigate cash flow issues by paying close attention to our budget needs, working closely with our funders to seek flexibility in timing of payments, and seeking new funding to close cash flow gaps.

2. Working with the Wikidata community.

While our staff has many years of experience in working with the English Wikipedia community, both as volunteers and as staff, we are less experienced in working with the community on Wikidata. We are launching a Wikidata program this year that includes edits to Wikidata, which means our program participants will be joining a Wikimedia project community we haven't worked with before. Any new project brings community risks. But we expect our extensive experience in working with the broader Wikimedia community, and our understanding of the importance of community work, will ensure that we pay close attention to the impact our program has on Wikidata and ensure it's fulfilling its goal of making Wikidata more accurate, representative, and complete.

3. Activism by Scholars & Scientists participants.

As the Scholars & Scientists program grows, we will bring many newcomers into the Wikipedia community who have an activist mindset and the ability to reach wide audiences – people who are more likely to make a splash. As we've seen with the program so far, many participants are interested not only in improving Wikipedia by writing articles, but also by addressing the root causes of systemic bias – such as Wikipedia's sourcing and notability rules and its deletion processes. The potential for a Scholars & Scientists participant to get more deeply involved in Wikipedia is both an opportunity and a risk. We're equipping these professionals with the tools to understand and interact with the Wikipedia community, and while we don't control what they do with these tools, their activities will reflect on Wiki Education and affect our relationship with the Wikipedia community. We will mitigate this risk by continuing to follow the Wikipedia-related efforts of Scholars & Scientists participants both on- and off-wiki, so that

we can communicate proactively if necessary to clarify Wiki Education's roles and positions on Wikipedia policy and culture.

4. Organizational resilience.

In fiscal year 2018–19, senior leadership created an "Organizational Resilience Grid", mapping out which positions on the leadership team have a backup in place and which don't. We learned that both the Executive Director as well as the Deputy Director currently fulfill tasks that could not be taken on by their colleagues if either of them left the organization. We also understood more clearly that the Executive Director fills in as the acting Chief Financial Officer and acting Chief Operating Officer, so in case he left we'd face a capacity gap in these two areas (unless a successor with a similar skill set could be recruited). Going forward, we'll work on improving the balance of responsibilities on the Senior Leadership Team. However, we're not confident that this issue can be fully resolved unless our revenue increases significantly so we can add capacity to our leadership team.