



Wiki Education Foundation
2016–17 Annual Plan

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Background and context

With a growing staff and board working together in last fiscal year 2014–15, it was a year of “firsts” for the Wiki Education Foundation. After that surge of growth, the period from July 2015 to June 2016 was a new phase. That period is defined by the growing impact of our programs, and the refinement of processes that fostered that growth.

- We continued signing partnerships with academic associations. Those agreements call on associations to encourage members to teach with Wikipedia.
- We supported instructors and students with new brochures.
- We created new onboarding and online orientations through our evolving →Dashboard tool.
- We launched the “Year of Science”, a large-scale initiative that improves Wikipedia’s publicly accessible science information while teaching thousands of students across the United States and Canada research, critical thinking, and science communication skills.
- We’re now supporting the →Visiting Scholars Program, encouraging interaction between Wikipedians and members of the academic community in a “bi-directional” exchange.

The results are clear. We’ve more than doubled the number of students learning critical 21st-century skills, such as information literacy and critical thinking, through our innovative teaching and learning approach. Participants in our programs also improved Wikipedia’s content on a scale that has vastly outpaced our expectations.

There are some core elements that made this possible. The strong support of our funders, our highly motivated staff that is eager to improve things that are working and willing to stop things that aren’t, the personal commitment of our board, and a positive and respectful relationship with Wikipedia’s community of longtime contributors.

Looking back: 2015–16

Summary of 2015–16 Performance

Our second fiscal year has seen the biggest growth in number of courses and students so far. We supported 214 courses in 2014–15 and 392 in 2015–16. That’s a change from 5,017 students to 8,086 in under a year. That means 50% more students benefited from positive learning experiences while improving Wikipedia’s content. The massive growth of our key program shows that our recruitment mechanisms are working. Most of our growth has come from targeted recruit-

ment efforts, such as partnerships and conference visits. We also have clear indicators that our support work is more effective. We supported a significantly larger student population with the same number of staff. That effectiveness is mostly the result of investments in Digital Infrastructure. That includes a completely revamped online training and a variety of printed support resources. We've seen fewer reversions of student work. In other words, students are contributing better content from the start. Our surveys have shown that 97% of instructors are willing to teach with Wikipedia again. These are strong indicators that the quality of our support is better than ever.

We didn't hit all our quantitative targets in fiscal year 2015–16. After we realized that we could not gain enough traction among instructors who teach media classes, we decided to de-prioritize our target of how many images got uploaded to Wikipedia and how many of those images were promoted to "Quality image" status. While a significant number of student editors added images to the articles they worked on, many of them uploaded media that don't comply with Wikipedia's standards. We are aware that illustrations play a critical part in improving article quality and we'll have to find better ways of empowering students to upload their own media.

We're also slightly below target in the amount of content added to Wikipedia. A lower number of "reverted" student contributions led to a decrease in overall word count; it also indicated an improvement in quality. Simply put, poor student work was less frequently re-submitted to Wikipedia. We're not particularly concerned that we've missed this target of total words added to main-space, because we know it came as a result of the increased quality of contributions the first time around.

We are particularly proud of hitting two goals. We're improving Wikipedia's coverage of women in science. We're also improving the articles identified as being most-often accessed (among the top 1% of Wikipedia's page views) but lowest quality. These areas benefited from our Visiting Scholars Program. Visiting Scholars are experienced Wikipedia editors who are granted remote access to library resources. They've made significant improvements to popular, but low-quality, Wikipedia articles. By creating and improving articles about notable women scientists, our students and our Visiting Scholars are presenting better information about role models for students in science, technology, engineering, and mathematics (STEM) disciplines.

Also, we have cultivated a good relationship with the Wikipedia community: we attribute this to the better visibility of high-quality content as well as to our efforts to support the local community on a national level (through WikiConference USA, which positioned us as a reliable partner that cares about the ecosystem as a whole).

After hitting our internal →stage-gate, we decided to put a couple of projects on hold. This did not affect our programmatic targets although our current rate of experimentation and innovation is lower than last fiscal year.

In development, we are still facing a situation that is typical for young and less established organizations. While we were able to build strong relationships with new funders like Google and the Simons Foundation, our work in the area of fundraising still has to prove that we're able to build a sustainable stream of revenue. On the positive side, we were able to grow our total number of prospects substantially and to experiment with cultivation events that connected us to potential funders. Also, for the first time, our board played an active role in supporting our development work and achieved 100% of board giving. However, with multi-year commitments from larger donors running out, we must intensify our work in institutional giving.

The overall good results of the fiscal year 2015–16 are a testament to the high level of both our staff and board's commitment to our organization's mission. As the board established new processes, policies, and committees that make their work more effective, our skilled staff remained highly motivated and eager to learn so we can further improve our organization's impact.

Activities, Goals, and Targets

Our 2015–16 Annual Plan outlined specific activities, goals, and targets in main areas: Core Programs; Program Support; Program Innovation, Analytics, and Research; and Other Activities. We'll report our work on each of these areas individually.

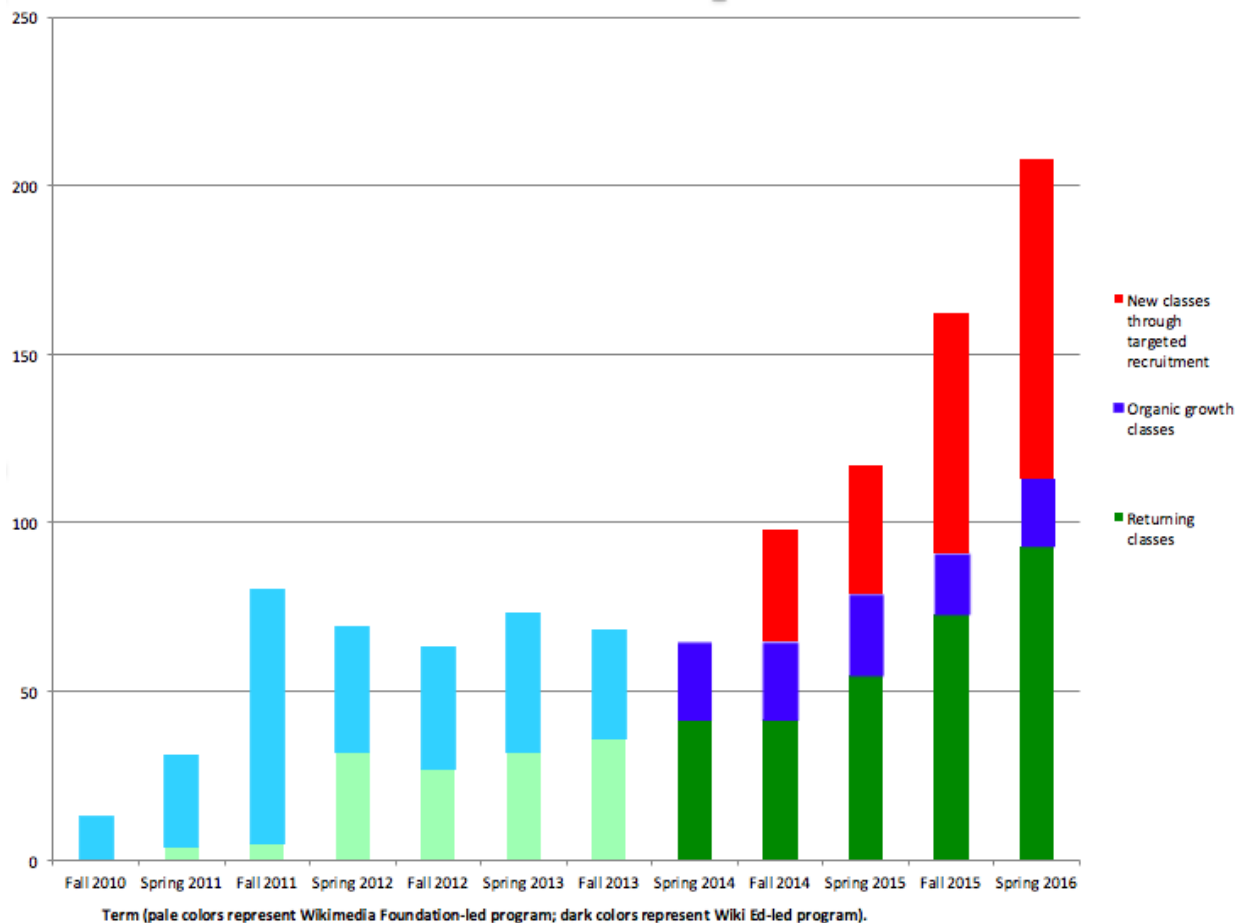
Core Programs

The Core Programs department houses the Classroom Program, Community Engagement, and Educational Partnerships and Outreach. In the first half of the fiscal year, the Core Programs work focused on building the foundation necessary to kick off the Year of Science, which we successfully launched in January 2016.

Classroom Program

In our Classroom Program, college and university faculty assign students to contribute content to Wikipedia as part of their coursework. We enjoyed healthy growth in 2015–16, increasing the number of courses we supported the previous year (see Figure 1).

Figure 1: Number of Classes, long-term trend



This growth was made possible through investments in digital tools, communications materials, and content expertise. The Classroom Program team refined processes, including establishing clear delineations of responsibility among team members, for onboarding new instructors, including those in the sciences. We also improved our support for new and returning instructors once their courses begin. We also increased our ability to make projections for program participation based on past trends.

These participation projections became incredibly helpful as we planned and supported the first cohort of students participating in the Year of Science. In the Spring 2016 term, we supported 116 Year of Science courses, with a total enrollment of more than 2,200 students. Students were on track to add about 1.9 million words in science topics to Wikipedia in the first term of the Year of Science.

Comparing student contributions this year to past terms, we saw that student work was less likely to be removed by another Wikipedian. This form of peer review is an expected part of the editing assignment, and we're clear on that from the outset. Nonetheless, seeing work removed less often

suggests that students are making stronger initial contributions. That led to another insight. When student work was reverted, they were less likely to place deleted content back in. Instead, they'd discuss changes with other Wikipedia editors first. Simply put, students made better contributions, and discussed changes when they make a mistake, rather than engaging in edit wars. As a result of these positive changes, students actually contributed less content, but better content, compared to previous terms.

These changes point to the success of several initiatives we've taken toward improving student work. Those efforts include defining "red flags" for new classes based on common characteristics of courses that posed challenges. We've also improved our student and instructor training, and created tools to better track student contributions. We're serious about making sure Wikipedia assignments benefit Wikipedia, as well as →student learning outcomes, with our Classroom Program.

Community Engagement

Our Community Engagement work serves to bring together the Wikipedia community with resources in academe, with the goal of building mutually beneficial relationships.

At the start of the fiscal year, the Community Engagement team began to manage the Visiting Scholars Program in the United States and Canada from the Wikimedia Foundation. We standardized the application process, increased visibility to both sponsors and scholars with profile pages on Wikipedia, and together with the Digital Infrastructure team, customized our Dashboard to demonstrate the impact that scholars make through these partnerships.

The various learnings of this pilot include the difficulty of identifying higher education institutions that are able to provide access to library resources to Visiting Scholars, who are unpaid and serve in a volunteer capacity. While these challenges have limited the fast scalability of the program, we believe the benefits of the program even scaling at a slower pace than we'd initially envisioned, make it a worthwhile project. We learned how to make the program truly bidirectional, by balancing the sponsoring institution's resources with the visiting scholar's subject of interest. This increases the reliability of resources on Wikipedia in topic areas the institution values, while respecting →Wikipedia's Conflict of Interest policy.

All told, we supported nine Visiting Scholar positions, two each at the University of Pittsburgh and the University of San Francisco, and one each at DePaul University, George Mason University, Hunter College, McMaster University, and Rollins College.

As part of the Year of Science, Community Engagement also developed monthly scientific themes for the →on-wiki Year of Science Portal. Collaborating with →WikiProject Women in Red

and →WikiProject Women Scientists, we encouraged volunteer Wikipedia editors to create biographies of influential women who have shaped our understanding of scientific concepts.

Educational Partnerships and Outreach

Our Educational Partnerships and Outreach team's role is to recruit new program participants for the Classroom Program and Visiting Scholars Program, as well as foster mutually beneficial connections with like-minded academic organizations.

In support of the Wikipedia Year of Science 2016, the Educational Partnerships and Outreach team signed memoranda of understanding with the American Society of Plant Biologists (August), Linguistic Society of America (November), Society for Marine Mammalogy (January), and American Chemical Society (April). In the Year of Science cohort, 22 courses, or 19%, were a direct result of these partnerships.

In fall 2015, we evaluated our outreach strategies to determine the value of each type of recruitment we do: Contact referrals, partner activity, conferences, on-campus presentations, emails, partner cold outreach, media, and non-partner cold outreach. Using this data, we systematically approached Classroom Program recruitment, increasing our new classes from targeted recruitment from 38 in spring 2015 to 95 in spring 2016 (see Figure 1).

We learned how powerful it is for our instructors to recruit their colleagues. We've since taken to asking instructors, through our end of term survey, if they are willing to refer a colleague. Classroom Program staff spent time identifying faculty to write about their experiences on our blog, and our Communications staff have engaged instructors on social media.

Partner activity (in which academic associations blog, tweet, or write articles about us to promote our programs) and academic conferences were our next-highest fertile recruitment ground. We attended mostly science academic conferences, whether we had a formal partnership with the organization or not, to raise the profile of our Year of Science initiative. We attended 13 conferences this fiscal year: International Association for Feminist Economics, American Society of Plant Biologists, American Chemical Society, National Women's Studies Association, Society for Marine Mammalogy, Linguistic Society of America, American Historical Association, American Association for the Advancement of Science, American Association of Geographers, Experimental Biology, Conference on College Composition and Communication, Festival of Learning, and American Astronomical Society.

The third most effective outreach activity is on-campus presentations. Usually hosted by the library, teaching and learning center, or an academic department, these workshops are open to campus faculty, and often, for community members or faculty from nearby campuses. Last year, we learned that these on-campus workshops are more effective than formal partnerships with col-

leges and universities, as they take less staff time and recruit more courses for the Classroom Program. Seventeen colleges and universities hosted our staff to present on teaching with Wikipedia to their faculty: University of San Francisco; Michigan State University; University of Michigan; Grand Valley State University; University of California, Berkeley (twice); Hunter College; Emory University; Georgetown University; Temple University; Bryn Mawr College; California State University, East Bay; Brown University; Northeastern University; University of California, Davis; University of California, San Diego; University of San Diego; and San Francisco State University.

This year, we also learned that cold outreach can be effective as a last-minute strategy to bring on more classes. We ran several campaigns where we collected professors’ names from their college or university’s website and sent them emails encouraging them to participate in our Classroom Program. While these are not as effective as other methods described above, cold outreach did result in 7 classes in the fall and 19 classes in the spring, so it is a strategy we can rely on – even just before the start of a term – to bring on additional courses.

Finally, we attempted to recruit media classes, as we had set annual plan goals for Quality Images, a designation contributors can achieve on photos they take and upload themselves. We were anticipating having several media classes on board, but we found that media-course targeting proved very challenging, so we discontinued this outreach after determining it was not worth the staff time.

Impact Targets

All of the activities described above in our different programs feed into the same goal: Improving Wikipedia and student learning. Because of this, we set overall impact targets, rather than delineating the work of each team:

Table 1: 2015–16 Impact Targets: Plan vs. Projection

Target	Goal	Projection
Number of Wikipedia articles improved	10,000	10,500 [1]
Number of words added to articles	7.8 million	6.6 million [2]
Number of images uploaded to →Wikimedia Commons	3,000	2,500 [3]
Number of new images uploaded and used in articles	2,000	1,200 [3]

Number of images recognized as “Quality Images” on Wikimedia Commons	100	0 [3]
Number of students having an enriched, reflective, and productive learning experience	6,500	8,086 [4]
Number of articles on women scientists improved	80	80 [5]
Number of articles from the list of the most-accessed but lowest-quality articles improved	20	25 [6]

Notes:

- [1] Our participants in the Classroom Program and Visiting Scholars Program made a significant impact on Wikipedia, improving more than 10,000 articles.
- [2] We realized our student editors are adding less overall content, but the content they are adding is not being reverted at the same rates, meaning it’s much higher quality content. Consequently, we did not hit our overall word projection number, which was tied to our previous estimate of content added per-student. We would rather have higher quality work, even if that means fewer overall contributions.
- [3] We anticipated working with several media classes to bring up these numbers. However, we did not find traction among media instructors, and as a result, we missed on these goals. A significant number of student editors added images to the articles they worked on, however, often pulling from public domain resources or uploading materials that don’t qualify for Wikimedia Commons. Additionally, our Visiting Scholars used library resources to upload digital images from the archives and special collections to illustrate articles as part of their Scholar position. Since illustrations are not typically included in the academic writing process of the U.S. and Canadian higher education system and we could not gain traction among media classes, we will not be setting numeric goals for images until we’ve found ways of encouraging and empowering students to add their own media to Wikimedia Commons.
- [4] While we did not hit our overall content numbers, we significantly exceeded the number of student editors we expected to support this fiscal year. Our Content Expert support, printed handbooks, and online resources enabled these students to achieve important learning outcomes as they edited Wikipedia for class.
- [5] A key focus of our Year of Science initiative was on improving biographies of women scientists. Participants in our Classroom Program and Visiting Scholars Program both worked to improve Wikipedia’s coverage of important women in science.
- [6] We took as definition for this goal articles of low quality – Start or Stub class – that had at least 250 page views each day, placing them in the top 1% of all articles read on Wikipedia. Our Visiting Scholars’ impact is most clearly seen here, as they tackled frequently read articles such as middle age, adolescent sexuality, and lactic acid fermentation.

Program Support

The Program Support department's mandate is to provide a support structure for all programmatic work at the Wiki Education Foundation. Program Support includes 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

Scaling the Classroom Program with a major investment in Digital Infrastructure was one of two key focus areas this year (the other being Year of Science). We planned to develop four additional new tech applications, as well as provide refinements to the existing applications.

The first project we called “just-in-time →bot”. In our original vision for the product, the just-in-time bot would provide automated help and suggestions to students and instructors based on automatically detected situations where our Content Experts currently intervene manually. As we began developing this feature, we decided we weren't at the point to have the just-in-time bot automatically intervene with students, but instead we wanted it to surface key student work for our Wikipedia Content Experts on the Dashboard. The just-in-time bot became the “Recent Activity Feed”, and it surfaced three feeds: (1) a feed of student →sandboxes, using Aaron Halfaker's “→Revision Scoring” work (Aaron Halfaker is the Wikimedia Foundation's Senior Research Scientist) to automatically detect how complete of a Wikipedia article the sandbox looked, (2) a →plagiarism checker, building off →WikiProject Medicine's plagiarism bot, and (3) a general feed of all edits from students. Throughout the year, we added additional features to the just-in-time bot, including the ability to filter it by courses you are involved with, emails to our staff members when plagiarism is detected, and a course-by-course recent activity feed on the individual course page on the Dashboard visible only to Wiki Education Foundation staff.

- Target: Just-in-time bot has launched, Q2
- Actual: Renamed “Recent Activity Feed” (<https://dashboard.wikiedu.org/recent-activity>) and launched September 2015

The second major project was a new, reactive version of our online training. Training had previously been offered through a series of interlinked Wikipedia pages. That platform offered very little control and metric data of users. Our new training system ported existing functionality, with the addition of quizzes and tools to track student progress. The training is embedded in our Dashboard, so that content is dynamically assigned to students based on what their specific as-

signment is and the subject matter of their course. This presents training when students need it, specifically catered to the topic they are studying and task they are engaged in.

- Target: Online training system is ready for use, Q3
- Actual: Online training (<https://dashboard.wikiedu.org/training>) launched, December 2015

The third scoped target in our Annual Plan was to build an instructor survey tool. We had relied on a third-party survey system to gather feedback from instructors at the end of every term. Our new built-in survey feature now automatically surveys instructors after the end of their course. It is tied into the Dashboard as the final step in the process of teaching a course within that platform.

- Target: Instructor survey is in use, Q4
- Actual: Instructor survey tool (<https://dashboard.wikiedu.org/surveys>, visible to our staff only) launched, April 2016

The fourth and final project scoped was the article finder tool, which would help instructors and students search for and select articles in need of editing and contributions. We made the strategic decision to swap this project out of our development pipeline and replace it with the →Wiki Playlist tool, a social media project that enables people to create and share a “Playlist” of Wikipedia articles, as part of the Year of Science to draw attention to science content on Wikipedia.

- Target: Article finder tool is functioning, Q4
- Actual: Replaced with Wiki Playlist tool (<http://playlist.wiki/>), which launched February 2016

We also continued to iterate on existing technical products, namely our Dashboard. In particular, instructors can now clone past course pages so they don’t have to re-create a timeline they’ve created in our system already, we refined the onboarding process to give instructors a better experience as they begin teaching with Wikipedia for the first time, and we spent significant time revising the timeline editing functionality of course pages to make it easier for instructors to make edits to the basic course framework.

Communications

In addition to supporting the communications needs of the organization, we created support materials for program participants.

The plan called for us to create four additional discipline-specific handouts presenting in-depth information about how students can contribute to specific content areas on Wikipedia, with a main focus on science topic areas in support of the Year of Science initiative. We continued to produce these throughout 2015–16, overshooting our goal. We added new discipline-specific handouts in: (1) Biographies, September 2015, (2) Species, November 2015, (3) Chemistry, November 2015, (4) Genes and Proteins, January 2016, and (5) Environmental Science, May 2016.

- Target: One handout per quarter each quarter
- Actual: One handout per quarter each quarter, with 1 additional handout also published in Q2

The other half of the work for the new online training discussed in the Digital Infrastructure lived in Communications: Developing the content for the new training. We revamped the content of the student and instructor training with a more modular approach, delivering specific information aimed at particular assignment types and course disciplines. In the process, we ended up creating additional modules covering topics we realized weren't well addressed in our old training content. We completed five modules for instructors and ten modules for students, all of which were launched in time for the start of the spring term.

- Target: Training content deployed, Q3
- Actual: Training content for five instructor modules and ten student modules deployed, December 2015

The final planned project for Communications was an on-wiki Year of Science portal to foster community engagement and enthusiasm around the initiative. With descriptions of projects, how to get involved, resources, and news and events, the portal is a central organizing space for community Year of Science initiatives.

- Target: On-wiki portal is created, Q2
- Actual: On-wiki portal (https://en.wikipedia.org/wiki/Wikipedia:Year_of_Science) launched, December 2015

In addition to the Communications work specifically outlined in the plan, Communications played a large role in fundraising, organizational communications, and social media, helping to recruit and retain program participants.

Wikipedia Content Experts

Our two Wikipedia Content Experts continued 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, provided advice to new contributors on what articles are ripe for improvement, offered feedback on drafts that participants had started, and suggested ways to improve articles even more.

- Target: 90% satisfaction rate with support received from Content Experts (baseline: 85% from Fall 2015)
- Actual: 85% satisfaction rate in Fall 2015, although 9% marked “don’t know”, so only a handful of people were unhappy with the support they received.

Program Innovation, Analytics, and Research

Much of the work of the Program Innovation, Analytics, and Research area was put on hold at the stage-gate (see section, below) due to a hold on hiring the staff to accomplish these goals, but several activities were executed prior to the stage-gate.

First, we conducted a pilot evaluating the potential for instructors interested in contributing content in their area of expertise during the summer. We piloted a Summer Seminar focused on psychology in summer 2015, in which instructors met weekly for one month to learn how to edit Wikipedia articles. At the end of this pilot, we drafted a final report documenting outcomes and suggesting next steps. Though participants were enthusiastic and eager to learn about Wikipedia, their contributions were small during the Seminar. The quality was high, suggesting that involving experts can lead to quality content; however, we believe the staff time inputs do not justify the output and outcome of this pilot program.

- Target: Summer Seminar pilot is complete, Q1
- Actual: Summer Seminar pilot wrapped up in August ([https://dashboard.wikiedu.org/courses/Wiki_Ed-APS/Summer_Seminar_in_Psychology_\(2015\)](https://dashboard.wikiedu.org/courses/Wiki_Ed-APS/Summer_Seminar_in_Psychology_(2015))); final report (https://meta.wikimedia.org/wiki/Wiki_Education_Foundation/Summer_Seminar_Pilot_final_report) published in October

Our second pilot was a new month-long Summer Research Fellow program in summer 2015. We hosted Dr. Andrew Lih of American University to help us answer outstanding questions from our programmatic work. For the inaugural Summer Research Fellow, we focused on creating a strategy and selecting case studies outlining how college and university libraries, museums, and ar-

chives could work with instructors, students, and/or the community of Wikipedia editors as part of the Year of Science. We then evaluated the effectiveness of hosting professors or graduate students in a Summer Research Fellow program to meet our long-term goals. We determined the Summer Research Fellow program is something we should do again in the future.

- 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) hosted at Wiki Education Foundation's office, Q1
 - Evaluation on effectiveness of Summer Research Fellow model complete, Q2
- Actuals:
 - Dr. Andrew Lih served as our Summer Research Fellow in July – August 2015
 - We hosted a popular reception (<http://www.opensym.org/2015/08/20/posters-in-the-house-of-wiki-ed-foundation/>) in conjunction with OpenSym in August 2015
 - We created an internal evaluation, documented on our office wiki, in December 2015

We had also planned to hold a meeting in Q4 with members of the research community in order to explore ways of empowering researchers to conduct qualitative and quantitative research around our programmatic activities. In early 2016 we decided that it would be more effective to make this meeting part of the WikiConference USA 2016 in next fiscal year 2016–17.

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

Other activities

Between October 9 and 11, 2015, the second WikiConference USA took place at the National Archives Building in Washington, D.C. Wiki Education Foundation co-sponsored the event in collaboration with the National Archives and Records Administration, →Wikimedia D.C., and →Wikimedia NYC. During the conference, we saw excellent presentations where Wikipedians, academics, librarians, museum workers, and archivists met and built relationships around the work they share. For Wiki Education Foundation the event offered the opportunity to connect with instructors in our Classroom Program as well as with Wikipedians who were interested in learning more about our activities. Staff members gave presentations on a variety of topics and members of our board used the opportunity to connect with longtime Wikipedia contributors.

The event strengthened our ties with the community of Wikipedians in the U.S. and raised our profile as an organization that deeply cares about the improvement of Wikipedia's content quality.

Stage-gate: Activities we put on hold

Upon reaching our internal stage-gate end of September 2015, we decided to put a number of activities on hold and only execute those if additional funding became available. These activities include:

Community engagement

- We will host a Wikipedia Year of Science preparation meeting in the fall, gathering community leaders to develop a strategy for how Wikipedians and postsecondary institutions, including campus museums and libraries, will work together in 2016.

Communications

- Volunteers in five locations have completed volunteer skills development training, Q3
- Understanding the community brochure is printed, Q4

Program Innovation, Analytics, and Research

- We will have executed experimental programmatic activities that meld the work of instructors, students, and/or the community with college and university libraries, museums, and archives, and documented our learnings and recommendations for next steps, Q4
- Analytics and performance systems exist and provides staff and other stakeholders with meaningful and correct information about our organization's programs performance, Q4

Revenue, Expenses, and Staffing

Revenue

In fiscal year 2015–16, we started the year with \$1,602,587 secured, roughly 43% of our initial target funding or 52% of our stage-gate target. Our primary goal for the year was to build a sustainable base of funding to support existing programs, new pilot programs, and scalability going forward by identifying and cultivating relationships with individuals and foundations that have an interest in advancing knowledge, knowledge sharing, pedagogy, and learning.

Sustaining and Growing Institutional Support

We made the choice at the outset of the fiscal year to focus our efforts on pursuing foundation and corporate grants. By doing so we were able to achieve new funding more quickly versus the time needed to cultivate relationships with individual donors. We benefited from the fact that the Year of Science created an attractive initiative for funders of STEM (science, technology, engineering, and mathematics), and in particular, women in STEM projects and programs.

- Outcome: Secured \$850K in new institutional funding from Google and Simons Foundation; both in support of the Year of Science.

Exploring Opportunities for Individual Support

We also explored a small-but-many giving campaign either through direct mail, online, or some combination of the above. It was determined that the return on investment would not be worth the drain on development staff resources required to manage a campaign with hundreds or thousands of small donors (\$250 or less) that could otherwise be applied to seeking major foundation and individual funding streams.

In an effort to expand our network of both foundation and major donor prospects, cultivation events were conducted in Washington, D.C., New York City, and San Francisco. The goal of these events was to raise awareness for our work and to serve as a catalyst to start new conversations with prospects.

- Outcomes include:
 - The recruitment of two informal champions (Judith Barnett and Martha Kanter)
 - The award of the Simons Foundation grant
 - The strengthening of our relationship with Google
 - Expanded our network by more than 150 people and reached more than 500 through invitations
 - Achieved one-on-one meetings with individual and foundation prospects

Creating a Culture of Development and Engaging our Board of Directors

Emphasis was also placed on creating a →“culture of development” within the organization, with specific focus on board engagement. The purpose of this focus was threefold: to leverage existing networks of our board members, to seek introductions to potential supporters, and to achieve 100% direct board giving. Additionally, the board created a Development Committee to formalize the board’s role in fundraising. The launch of the board giving campaign in late 2015 also drove the development of a “donate” button on our website. This feature allowed us to accept gifts online for the first time.

Installing Best Practices

Development policies and procedures¹ were drafted to ensure best practices in fundraising. The fundraising team also leveraged Salesforce as a critical tool to track and manage the now-populated fundraising pipeline.

Table 2: 2015–16 Development Targets: Plan vs. Projection

Target	Initial target	Stage-gate target	Actual	Variance actual vs. Stage-gate
Overall Revenue (after September 2015 stage-gate)	\$3.7	\$3.2M	\$3.3M	+1%
Achieve 100% direct board giving	100%	100%	100%	–
Conduct 1–2 Cultivation Events	1–2 events	1–2 events	3 events	+50%

Expenses

To maintain the highest level of oversight and organizational practices, a separate Finance Committee was created, independent of the Audit Committee. This ensured that our organization would develop the highest standard as we moved to secure financial stability. The Director of Finance and Administration, working with the Audit Committee, completed our first ever audit along with the associated tax return. The Finance Committee and the Director of Finance and Administration developed key organizational policies and established guidelines for regular monthly financial reviews.

¹ Gift processing procedure, Donor Bill of Rights, Donor Privacy Policy, Gift Acceptance Policy, Gifts In-Kind Policy

Table 3: 2015–16 Finance: Plan vs. Projection

	2015–16 Initial Plan	Stage-gate Plan	2015–16 Projection [1]	Variance projection vs. Stage-gate Plan
Revenue	\$3,679K	\$3,242K	\$3,289K [2]	+1%
Expenses	\$3,679K	\$2,988K	\$2,988K	0%

Notes:

[1] Projections made based on actuals through March 31, 2016.

[2] Includes \$23K carryover of remaining \$300K tech grant from Stanton Foundation.

Staffing

During FY 2015–16, we made adjustments in order to deal with the growing demands in key areas of our organization: we moved two half-time positions to full-time positions: both Wikipedia Content Experts Adam Hyland and Ian Ramjohn are now working full-time for us, based on the fact that our Classroom Program supports a quickly growing number of student editors. Victoria Hinshaw joined our organization in August 2015, strengthening our development team. In January, Kevin Schiroo joined us as our part-time Data Science Intern. We also hired Tanya Garcia as the new Director of Programs in an attempt to re-balance our senior management team and to expand its skill set. However, after half a year Tanya left the organization and LiAnna Davis resumed oversight of all programmatic work. Overall, staffing investments followed our emphasis on programmatic work, with the majority of positions filled in programs. Our original plan called for a total of 18 full-time and 2 part-time staff. When the decision was made to implement our internal stage-gate in September 2015, we decided that 4 full-time positions would not be filled. This was aligned with last fiscal year’s plan that called for only filling these new positions and moving into a bigger office if we hit our internal revenue targets. Instead, we achieved the same programmatic results by performing in more efficient and smarter ways. As of today, our staff consists of 13 full-time, 1 part-time employee, and 1 intern, with 10 staff members working out of our office in the Presidio of San Francisco.

In 2015–16, we’ve continued our investments in employee professional growth. During our all-staff meeting in July, staff learned the basics of program evaluation, so we all have a shared language and an understanding of how evaluation can drive impact. In addition, staff members were offered individual development measures, including personal leadership coaching sessions, three-day management trainings offered by the American Management Association (AMA), a presenta-

tion by Edward Tufte on “Presenting Data and Information”, individual coaching on volunteer management, and a science writing course. We see those professional development measures not solely through the lens of workplace productivity. Instead of investing in professional development to “fix” an issue with a staff member’s productivity or behavior, we invested in staff members to make them even better at something that they’re already good at. As a result, job satisfaction is high and except for Tanya Garcia (who left the organization in May 2016) we did not have any other staff turnover in 2015–16.

Table 4: 2015–16 Staffing: Plan vs. Projection

	2015–16 Plan	2015–16 Actual	Variance from Plan
Staffing	20 (19 FTE)	16 (14 FTE) [1]	-8%

Notes:

[1] We’re counting Tanya Garcia as a FTE for 2015–16 as she left close to the end of the fiscal year.

Looking ahead: the 2016–17 Plan

Overview

In 2016–17, our Year of Science initiative will culminate with the largest number of students to date engaging in improving Wikipedia’s content in the areas of writing skills development, media and information literacy, critical thinking and research skills, collaboration, and online communications skills.

While we were focused on building momentum and awareness for the Year of Science in the last two quarters of fiscal year 2015–16, the first half of next fiscal year will be dedicated to reaping the benefits of this work. Not only will this be a response to the board’s desire of achieving an audacious goal for our organization, it will also set a mark in how our organization furthers student learning outcomes across colleges and universities in the United States and in Canada while improving Wikipedia’s coverage in a largely underdeveloped content area.

The second half of the Year of Science 2016 – and our ability to demonstrate strong impact – will raise awareness with two key constituents for the long-term future of our organization: instructors and potential donors. Initial results from the instructor survey at the end of each term point toward “lacking awareness that teaching with Wikipedia is possible” being among the main reasons new instructors don’t join our programs. If more instructors knew about the benefits of teaching with Wikipedia, especially when it comes to better student learning outcomes, more of them would choose a Wikipedia assignment over a traditional one. A similar mechanism is at work with regard to our fundraising efforts. Whenever people learn about the existence of our organization, they are amazed by our ability to demonstrate impact and they’re more likely to fund our work. That’s why building awareness among potential donors and instructors will help us scale, both with regard to our impact and our development work.

Past experiences clearly demonstrate that removing time constraints on staff also removes a bottleneck to scaling. That’s why additional investments in our online infrastructure will enable us to deliver high-quality support services for an increasing number of students and instructors in our programs without growing our staff. If and when additional funding is available, we will create new features for our online Dashboard. Through maximizing the efficiency of that tool, we can serve more program participants with the same number of staff.

Based on whether we hit our fundraising targets for next fiscal year, we will also make investments in small-scale experiments and additional software features. These additional goals and activities are marked as “supplemental” below.

Key Initiatives in 2016–17

Wikipedia Year of Science

We kicked off the Year of Science work in last fiscal year, successfully recruiting, onboarding, and supporting more than 114 courses with 2,000 students who gained science communication, research, and media literacy skills as they wrote Wikipedia articles on scientific topics.

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

- September–December 2015: During the preparation phase, we established the infrastructure needed to launch the Wikipedia Year of Science in early 2016. That included 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 kicked off the Wikipedia Year of Science with a large push for science courses to participate in our Classroom Program.
- July–December 2016: Based on the results from the spring term, we will continue the work of the Classroom Program to improve science content. We will also begin to evaluate learnings from the “Year of” model to determine if such a campaign is something we should pursue again in future years.
- January–March 2017: We will work to sustain the impact of the Year of Science by ongoing engagement among science faculty and students after the formal end to the program. In a final evaluation, we will determine learnings from the “Year of” campaign model for improving content on Wikipedia while engaging instructors and students in reflecting on the creation and communication of knowledge.

This fiscal year, the focus will be on the final two phases. All the work we’ve put into bringing attention to the Year of Science, the possibility of teaching science communication skills with Wikipedia assignments, and the Visiting Scholar Program will culminate in the fall 2016 term, where we anticipate supporting more science courses and students than ever before. We will continue to develop partnerships and resources to support these additional program participants during the final term of the Year of Science and beyond the formal campaign, with a focus on sustaining our momentum after the formal end to the initiative. In the second half of the fiscal year, we will move into the evaluation phase of the Year of Science, answering questions about the

impact of the Year of Science on Wikipedia and student learning, and determining next steps for additional “Year of” campaign models.

Increasing awareness of the Wiki Education Foundation

As we scale both our programs and our fundraising base, we face a challenge that many new non-profits have to deal with: Getting people to know we exist. We’ve found that what holds many instructors back from teaching with Wikipedia is simply a lack of awareness that they can teach with Wikipedia using our organization’s support structure, meaning we need to do a better job of making ourselves known on college and university campuses. Our work with academic associations is a key facet of this strategy, but we need to begin exploring other ways of reaching instructors if we want to continue to scale.

Raising awareness of our organization is key for fundraising efforts as well. While we have been fortunate to receive large grants from foundations in our early years, we know we need to diversify our funding sources. Beyond adding diversity to our funding sources, major donors will also help us keep our spending flexible as donations from individuals are unrestricted. Currently, major donors are unaware that we exist. We have a story that is compelling to donors, but getting us in front of those donors so we can share our story of impact is crucial. Determining the best ways to reach potential major donors will be a second facet to our awareness campaign.

Activities, Goals, and Targets

Core Programs

The Core Programs work will focus on making our programs more sustainable and scalable, including raising the visibility of the Wiki Education Foundation among academics. For the first half of the fiscal year, we will focus on recruiting and retaining courses that are part of our Year of Science initiative during fall 2016. The second half of the fiscal year will include reflection time for evaluation of learnings from the Year of Science initiative, and initial efforts at sustainability from the “Year of” campaign model. Throughout the year, we will also experiment with new activities within the Visiting Scholars program to enable us to scale its impact.

Goal: Recruit participating Classroom Program instructors and Visiting Scholar hosts

The focus of the Educational Partnerships and Outreach team will be to increase the visibility of teaching with Wikipedia through Wiki Education Foundation’s programs through on-campus presentations, academic association partnerships, and webinars, with a special focus on Year of

Science disciplines. We will continue our data-driven approach to recruiting new instructors and new Visiting Scholars host institutions, while innovating around new types of partnerships. Activities include:

- Host regular professional webinars about teaching with Wikipedia to recruit new program participants, or to encourage existing program participants to champion our program to their colleagues.
- Establish partnerships with academic associations to promote the use of Wikipedia as a teaching tool in higher education classrooms within that discipline.
- Attend academic association conferences (including purchasing booth space and rental fees) and do campus visits to promote the use of Wikipedia as a teaching tool and the Visiting Scholars program, with a focus on Year of Science recruitment for the fall 2016 term.
- Investigate whether Wikipedia edit-a-thons are a good opportunity to recruit program participants.
- Experiment with new ways of engaging with academic association partners to increase scalability of partnership model.
- Analyze efficacy of recruitment initiatives to determine long range plan for scaling outreach.
- Pilot support for Faculty Learning Community on teaching with Wikipedia within a college or university to determine whether it works as an institutional scaling model.

Goal: Systematically approach Classroom Program instructor retention

While we've taken a systematic approach to recruitment of new instructors for our Classroom Program, we have only begun to scratch the surface of a systematic attempt to retain these instructors past their first term. In 2016–17, as we wrap up and evaluate the Year of Science, we want to do so with a focus on sustainability: How can we ensure that instructors who started teaching with us through the Year of Science initiative will continue to design student assignments to improve Wikipedia? Our primary approach will be to create a data-driven retention strategy for instructors who have taught with Wikipedia through our program in the past, with a special focus on Year of Science disciplines. Activities we will pursue include:

- Reach out to the New York contingent of instructors to investigate success factors for their in-person collaboration and mentorship, and determine if this strategy can be replicated in other cities.
- Send mid-term check-in emails to first-time instructors, reminding them of our organization's support.

- Invite new instructors to blog for us on their experiences teaching with Wikipedia to increase affiliation with our organization.
- Collaborate with Communications on increasing social media coverage of specific instructor's student work.
- Provide “report cards” for top 5% of courses in terms of amount of content added per student, so they can understand the impact their work has had.
- Better leverage existing instructors as collaborators at academic conferences and campus workshops.
- Investigate an awards program for course achievements.
- Pilot thematic virtual brownbag meetings or webinars where an instructor will do a short talk on a particular topic (e.g., Wikipedia's gender gap, Wikipedia and science communication, etc.) and then open it up for discussion among attendees. Record these and make them available on our website.

Goal: Expand Visiting Scholars Program

In this fiscal year, we will pilot new ways of engaging host institutions and scholars to scale the impact of the program. We believe this program continues to be an important part of our programmatic toolbox, offering a way to focus on quality of articles rather than quantity of articles and provide a bidirectional support experience by giving Wikipedia editors access to academic library resources. In particular, it gives us a chance to target quality improvement of high-traffic articles. Activities we will pursue include:

- Expand our work with academic associations to include sponsoring Visiting Scholars
- Conduct research into Wikipedian-in-Residence roles to look for parallels in the programs to determine changes we should make in program design for Visiting Scholars
- Introduce assessment into the Visiting Scholar program structure, with an eye toward focusing on B-class or better output from Scholars

Goal: Evaluate Year of Science

To fully understand the impact of the Year of Science, we need a comprehensive program evaluation to occur throughout the 2016–17 fiscal year, focusing on outcomes achieved during the Year of Science, what worked and what didn't about our approach, and whether these “Year of” initiatives are a good direction for Wiki Education Foundation. To support this work, we plan to continue our data science internship, as well as devote staff time to evaluating the Year of Science's inputs, activities, outcomes, outputs, and impact.

Supplemental goal: Establish honorariums for Visiting Scholars

One challenge the Visiting Scholars Program has faced as we've tried to scale it is the lack of financial connection to the program. We would like to pilot the use of honorariums to determine if this makes the program more attractive to individual Wikipedia editors who might want to serve in the Scholar role, as well as makes them more likely to make more significant content contributions to Wikipedia than they would otherwise as part of their Scholarship because they are receiving an honorarium for their work. Note: As a supplemental goal, we will only pursue this if we deem it is financially responsible to do so.

Supplemental goal: Pilot a graduate student program

We would like to pilot a program to empower more graduate students to edit Wikipedia. Graduate students are an untapped resource: Many of them have expertise and writing skills, but we haven't figured out good ways of working with them yet unless they're in a class. In this pilot, we would create a graduate student → independent study elective (formalized with either an academic association or a professor) to write Wikipedia articles – grad students often write comprehensive literature reviews on topics to establish grounding in a topic area, and this idea would be to encourage students to write Wikipedia articles. We'd support them as normal classes, with a handful of students who would independently be writing articles. These independent study initiatives would include payment to the students in the form of a stipend or honorarium. Note: As a supplemental goal, we will only pursue this if we deem it is financially responsible to do so.

Impact targets

Our work in the Core Programs will all feed into the following annual targets, with baseline numbers from 2015–16:

- Number of students having an enriched, reflective, and productive learning experience: 12,500 (up from baseline of 8,000)
- Number of Wikipedia articles improved: 12,500 (up from baseline of 10,500)
 - Number of articles on women scientists improved during Year of Science: 100 (up from baseline of 60 in spring 2016)
- Number of words added to articles: 9 million (up from baseline of 6.6 million)
- Number of articles improved to →B quality level or higher: 80 (up from baseline of 12)

Program Support

After a significant investment in Program Support last fiscal year to build up the infrastructure to support a much larger number of courses in the Classroom Program, we will spend this fiscal year simply making minor adjustments to our support structure as we determine how well it handles the significant increase in courses next year. Much of the potential work within Program Support is found in the supplemental goals section; we will add projects from there to our goals if we determine it is financially viable to do so.

Goal: Maintain excellent technical support system for program participants

Our Dashboard course management system offers Classroom Program and Visiting Scholars Program participants the ability to determine, monitor, and track the activities and outcomes of the work on Wikipedia, as well as an ability for us to lead instructors through an assignment design wizard, students and instructors through an online training, and all program participants through a survey functionality. Ongoing maintenance work is needed to continue to deliver high-quality technical tools program participants have come to rely on. Additionally, we will determine if collaborations with other entities interested in contributing to our open source Dashboard code base could enable us to add minor features to improve program participants' experiences.

- Activities:
 - Work with technical partners to ensure maintenance of a high quality Dashboard product for program participants.
 - Continue adapting the Dashboard to better meet the needs of instructors, student editors, and our staff.
 - Investigate potential Dashboard project mentorship in technical programs like →Outreachy or →Google Summer of Code.
 - Engage with the MediaWiki technical community to encourage more volunteer development projects on the Dashboard.
 - Explore more formal collaborations with the Wikimedia Foundation to produce features that may benefit both Dashboard and the version they have modified from our open source code base.
 - Determine feasibility for piloting a Classroom Program computer science course model where students contribute code to our Dashboard code base rather than content to Wikipedia.
- Target:
 - 97% →code coverage for server (Ruby) code (baseline: 91%)
 - 90% code coverage for client (JavaScript) code (baseline: 57%)

- Increase → commits to Dashboard code base from Wikimedia Foundation staff to at least 136 (baseline: 68)
- Expand the number of contributors to the Dashboard code base outside of Wikimedia Foundation, WINTR, or our own staff to 6 (baseline: 3), and commits to 50 (baseline: 9)

Goal: Communicate Year of Science and other program outcomes

A major part of the Communications work will be to continue activities in support of the organization and its programs, and in particular of the Year of Science initiative. This work is crucial in raising Wiki Education Foundation's profile in the media, for participating instructors and potential donors to our organization.

- Activities:
 - Engage external media (including independent blog posts, media coverage, academic texts, and partnership newsletter articles) to cover Wiki Education Foundation's programs and impact.
 - Highlight student-authored Year of Science articles on our blog and in our social media channels.
 - Increase quality, quantity, and readership of blog posts on Wiki Education Foundation's blogs, especially those focused on Year of Science content.
 - Create proposals and reports on programmatic impact for the development team.
 - Collaborate with development team on communications elements of major donor activation campaign.
- Targets:
 - 35 external media engagements (baseline: 28 from 2015–16)
 - 200 student-authored Year of Science articles highlighted (baseline: 100 from Spring 2016)
 - Our own science-related content read by more than 7,000 readers (baseline: 5,500 readers from 2015–16)
 - Note: Targets for work in support of development team can be found in the development section below.

Goal: Support recruitment and retention efforts for the Classroom Program through communications work

Communications also plays a key role in assisting the Core Programs initiatives to recruit and retain instructors in our Classroom Program. Ongoing communications work directly supports

the Classroom Program initiative, and it is important to acknowledge its crucial role in the success of the Core Programs team as they grow the number of program participants

- Activities:
 - Create a postcard about our programs that can be a low-level giveaway at conference booths.
 - Work with instructors who have expressed interest in guest blogging for us.
 - Refine instructor onboarding process to simplify complex steps and remove current roadblocks to scaling.
 - Create a new, periodic, and text-based email newsletter for participating instructors, which highlights blog posts of interest, our conference and campus visit schedule, opportunities for instructors to get more involved in our program, and new research on teaching with Wikipedia.
 - Create additional discipline-specific handouts for student editors.
 - Maintain current line of high-quality printed support handbooks for instructors and students in our program, mailed to program participants who request them.
 - Pilot small social media advertising campaigns aimed at reaching new instructors who may be interested in teaching with Wikipedia.
- Targets:
 - Postcard about our programs created and printed, July 2016
 - 20 guest blog posts from participating instructors (baseline: 15) (Note that some of these are also included in the Research and Academic Engagement section below)
 - Distribution of at least four email newsletters; evaluation of efficacy of this medium for reaching instructors, as determined by end-of-term survey
 - Creation of four new discipline-specific handouts (one per quarter each quarter)
 - Evaluation of social media advertising pilot completed, with next steps determined, January 2017

Goal: Maintain high level of support from Wikipedia Content Experts

Maintaining the excellent support from our Wikipedia Content Experts is key to scaling our Classroom Program by providing an exceptional experience to program participants, leading to retaining our good professors.

- Activities:
 - Create lists of articles on course-related topics needing improvement.
 - Answer questions from student editors and instructors.

- Monitor student activity on-wiki, attempting to head-off potential incidents.
- Provide detailed constructive feedback to student drafts.
- Address any incidents that arise promptly and to the satisfaction of both participants and the Wikipedia community members involved, as appropriate.
- Identify good student work for use by outreach, communications, and development.
- Targets:
 - 90% satisfaction rate overall from instructors for support received from Wikipedia Content Experts (baseline: 85%)
 - 90% satisfaction rate in Wikipedia Content Expert feedback on student drafts, from instructors who received this support (baseline: 85%)
 - 90% of all incidents are resolved within five business days (baseline: 90%)

Supplemental goal: Create elements of Dashboard API

This project is code-named the “Dashboard →API” – essentially, a way for other computer systems to “speak” to Wiki Ed’s Dashboard and get data out of it in a machine-readable format. The Dashboard API will enable us to do several important things: (1) It creates an easy way to get data sets about our program impact, opening up our program as a potential focus for outside researchers interested in studying Wikipedia. This tool could foster academic engagement on topics of programmatic impact; outside academic researchers looking for Wikipedia-related research projects can access our data, thereby enabling them to look into our work and potentially identify areas we could improve upon in our programmatic work. (2) It enables us to connect the Dashboard database to our internal Salesforce tracking database, eliminating a lot of staff time that is spent typing information from the Dashboard into Salesforce and enabling us to support more classes with our current staffing. (3) It can enable us to provide an export functionality of key milestones and assignment dates for Canvas, Blackboard, or other course management systems, providing a key marketing point around a commonly requested feature from new instructors. Note: As a supplemental goal, we will only pursue this if we deem it is financially responsible to do so.

Supplemental goal: Develop technical support for more →assignment types

Another supplemental goal will be to develop technical support for more assignment types, including one to enable students to do a critical thinking exercise resulting in structured data about article quality. One challenge to scaling our current Classroom Program is that our preferred assignment type – create or expand a Wikipedia article – requires advanced writing skills, and it’s

not appropriate for a large percentage of the classes taught at colleges and universities in the US and Canada. In this project, we will create more technical infrastructure for other assignment types that could provide students important critical thinking and media literacy skills, while also resulting in structured data about article quality, something other courses could use when improving those articles. Adding assignment types like this to our Dashboard would enable us to support a much larger percentage of courses currently offered in the United States and Canada. While these assignment types would have less direct impact to Wikipedia, they would teach more students about media literacy with Wikipedia. Success would be measured in terms of how many students we were able to serve with these new assignment types that were previously unable to participate in our program because their class type wasn't right for a write-a-Wikipedia-article assignment. Note: As a supplemental goal, we will only pursue this if we deem it is financially responsible to do so.

Supplemental goal: Develop technical resources to eliminate current roadblocks for program participants

Technical projects like the →Diff Viewer (which enables instructors to see what students add to articles from within the Dashboard), Playlist integration (in which professors can easily select great student work from the Dashboard to be created as a Playlist at playlist.wiki), the →Article Finder (in which instructors or students are guided through a tour of start- and stub-class articles in the course topic to generate a list of good candidates for students to improve), →Resource Finder (which ties →ask.wikiedu questions to syllabi, brochures, training modules, and other resources), and a Messaging system (in which we could notify students with helpful suggestions using message channels beyond their Wikipedia talk pages) will all help reduce the load on our Wikipedia Content Experts, meaning we will be able to support more courses with the same amount of staff. Note: As a supplemental goal, we will only pursue this if we deem it is financially responsible to do so.

Supplemental goal: Develop student-oriented online resource hubs in key disciplines

To increase the quality of student work, we will add additional support resources for student editors. We've seen a lot of early success with student-focused support resources that offer discipline-specific advice; we will continue this work with a larger focus on creating online resource hubs in key disciplines for student, beginning with science topics for the Year of Science. These Dashboard resource pages will include guided directions of how to successfully contribute content in that specific topic area, with links to relevant student training modules, ask.wikiedu questions, and brochures. Resource hubs will be linked from course pages where relevant. Note: As a supplemental goal, we will only pursue this if we deem it is financially responsible to do so.

Supplemental goal: Additional communications work to support Classroom Program recruitment, retention, and support

As we scale our Classroom Program, additional communications projects will be helpful in the recruitment, support, and retention of program participants. We will create a video project highlighting why instructors find teaching with Wikipedia to be a productive use of their valuable energy, as well as the learning outcomes students get from writing Wikipedia articles. To raise the visibility of our organization, we'll also investigate possibility of sending senior staff on speaker circuit to talk about Wikipedia in broader academic context as keynote at academic conferences. Finally, we will sponsor a volunteer skills development workshop, in which existing program champions would be trained in how to speak at their academic conferences and on their campuses, to have a more diversified recruitment mechanism. Note: As a supplemental goal, we will only pursue this if we deem it is financially responsible to do so.

Research and Academic Engagement

Overview

In the new area of Research and Academic Engagement we will encourage and empower collaborations between academia and the Wikipedia community in service to Wiki Education Foundation and to the field teaching with Wikipedia. We will focus on three key areas:

- Encourage and empower research that informs potential funders and the general public about the impact of our programs;
- Create metrics and data that support decision-making in programs; and
- Communicate the benefits of participating in our programs to recruit and retain college and university faculty and staff and members of the Wikipedia community.

Research Agenda

As an organization that values continuous improvement, we have launched several projects to help shape and guide its programmatic activities. We will continue this practice, with our first goal being to create and implement a research strategy that will guide our direction in the student learning outcomes area. Conducting qualitative and quantitative research around the benefits of teaching and learning with Wikipedia will make an important contribution to the growth of our Classroom Program.

Organizational Metrics

Wiki Education Foundation has robust indicators on student contributions to Wikipedia. Our organization reports its progress toward annual impact targets on a monthly and yearly basis. In addition, we will develop additional indicators that capture the organization's impact on student learning. Metrics development and improvement will guide programmatic decision-making.

Communicating Benefits of Program Participation

When the academy and Wikipedia community hear about our programmatic impact, they realize that we offer an innovative model that is well supported and grounded in what we have learned. Our program participants make the collaboration between academia and Wikipedia possible. By creating the environments for these partnerships, we are able to continue and improve existing programs. And by spreading the word of our programmatic benefits, we are able to scale up and increase interest and participation in our programs.

2016–17 Goals and Targets

Goal: Conduct research study that demonstrates the impact of the Classroom Program in the area of student learning outcomes

This research will explore to what extent participating in our Classroom Program leads to particular learning outcomes for students. In collaboration with existing program instructors who have expressed interest in conducting research on student learning outcomes, we will design and implement a study (using pre- and post-assignment student surveys and focus groups) that assesses the extent and ways in which teaching with Wikipedia achieves writing, media and information literacy, critical thinking and research, collaboration, and online communications skills in comparison to a traditional research paper.

Targets:

- Research study on how participating in our Classroom Program leads to particular learning outcomes in comparison to traditional research paper for students completed, Q2

Goal: Empower participating instructors to communicate the pedagogical benefits of teaching with Wikipedia

Program participants are in an ideal position to communicate the benefits that students acquire by completing a Wikipedia assignment. Collaborating with existing program participants, we will encourage more communications work about the pedagogical benefits of teaching with Wikipedia, including teaching and learning conference submissions and blog posts. Preparing successful conference proposals that feature our research projects will help establish our expertise in both the teaching and learning and open education areas. Equally important, attending these conferences with like-minded faculty members has the potential of recruiting additional Classroom Program instructors. The outcome will be to increase the visibility and awareness of our Classroom Program as innovative pedagogical tool in order to recruit new program participants.

Targets:

- Successful submission of student learning outcomes research through peer-reviewed process accepted at 2 teaching and learning in higher education conferences, Q4
- 8 Wiki Education Foundation blog posts on student learning outcomes benefits, Q1 through Q4 (Note: this is included in the 20 instructor-authored blog post numbers identified in the communications section above)
- 5 external media engagements addressing student learning outcomes and the benefit of teaching with Wikipedia (Note: this is included in the 35 external media engagements identified in the communications section above)

Support creation of pre-conference or other education track at WikiConference USA 2016 in San Diego, and investigate potential for an education pre-conference or track at Wikimania 2017 in Montreal.

Supplemental goal: Conduct research study that explores how engaging in open educational exercises change postsecondary students' attitudes and perceptions of Wikipedia

This research will explore how student perceptions and attitudes change by editing Wikipedia. The research design will consist of identification of attitudes toward Wikipedia we seek to foster and support, pre- and post-student surveys, and focus groups of students participating in the Classroom Program. The primary research questions are: How do student attitudes about contributing and collaborating to Wikipedia change by taking courses supported by Wiki Education Foundation? What is the extent to which student attitudes around editing Wikipedia deepen the acquisition of learning outcomes? The outcome will be an independent research report that describes how student attitudes and perceptions change as a result of the Wikipedia assignment.

Note: As a supplemental goal, we will only pursue this if we deem it is financially responsible to do so.

Supplemental goal: Form and convene the Student Learning Advisory Council to explore alignment of our student learning outcomes indicators with existing efforts in this space

The Student Learning Advisory Council of up to 10 instructors and other experts will: (1) explore alignment of our student learning outcomes indicators with those of various efforts in this space (→Degree Qualifications Profile (DQP), Association of American Colleges and Universities (AAC&U) →Valid Assessment of Learning in Undergraduate Education (VALUE) rubrics); and (2) provide advice and counsel for future research in this area. Note: As a supplemental goal, we will only pursue this if we deem it is financially responsible to do so.

Supplemental goal: Conduct a small pilot that determines the effects of increased scholarship around teaching with Wikipedia on participation in our Classroom Program

College and university faculty and staff who publish in pedagogical journals and attend these types of conferences are potential key allies who can validate the benefits of teaching with Wikipedia. This experimental work will explore whether increased scholarship around teaching with Wikipedia can attract faculty into the Classroom Program. If successful, this pilot will be an additional outreach tool we use to recruit new instructors. We will facilitate this exploration by providing access to anonymized data from our Dashboard that adheres to our privacy policy. Our initial focus will be to identify faculty and staff at colleges and universities where we have supported a large number of instructors. There are two potential outcomes: (1) explore the feasibility of this effort as a new outreach tool; and (2) increase the visibility and awareness of our Classroom Program as an innovative pedagogical tool. Note: As a supplemental goal, we will only pursue this if we deem it is financially responsible to do so.

Strategic planning for 2017–2019

In 2015, we developed our first two-year strategic plan which set the direction for our organization until 2017. Next fiscal year, we will again embark on a strategic planning process that will cover the time between July 2017 and June 2019. For that purpose, we will engage board members and staff in an exploration of potential futures for Wiki Education Foundation which are beyond the horizon of the organization's current strategy and operations, that achieve the Foundation's mission and that generate a powerful platform for the Foundation over the coming years.

The strategic planning process will begin in Q2 and culminate in a board retreat in Q3 that will create alignment around the direction for the future.

Revenue, Expenses, and Staffing

Revenue and Development

The greatest development challenge in fiscal year 2016–17 is raising awareness for Wiki Education Foundation’s work. We could significantly shorten the →donor cultivation cycle and increase the sustainability of the organization’s funding streams if more funding institutions and individuals simply knew who we were and what we accomplish each year.

In fiscal year 2016–17 we will increase awareness for the Wiki Education Foundation while significantly expanding the amount of prospects in our two primary funding streams: institutions (foundations and corporations), and individual giving.

Strategic Goals

Wiki Education Foundation commits to accomplishing the following strategic goals as part of the Annual Development Plan:

- Utilize best practices throughout all development strategies
- Regularly test strategies and analyze results to determine what is most effective
- Ensure cohesive development team working together to accomplish goals

Targets

- Double the total number of institutional donors by 50% from 3 to a minimum of 5
- Establish major donor campaign and secure at least 6 donors giving at \$10,000+
- Increase our prospect pipeline size by 50%
- Maintain at least 25 major prospects in the cultivation² stage (foundation and individual, each) throughout fiscal year 2016–17
- Maintain 100% participation by Board of Directors

² Stages of cultivation: identified, research, cultivation, proposal submitted (solicitation), proposal awarded, decline/withdraw

Table 5: Revenue Scenarios for 2016–17

Donor Category	Projected Close Date	Scenario A	Scenario B	Scenario C
Institutional Giving: Re- newal				
Corporate	Q2	–	–	\$250,000
Foundation A	Q2	\$500,000 [1]	\$500,000 [1]	\$500,000 [1]
Foundation B	Q1	\$300,000 [1]	\$300,000 [1]	\$300,000 [1]
	Subtotal	\$800,000	\$800,000	\$1,050,000
Institutional Giving: New				
New Foundation L	Q3	–	\$500,000	\$500,000
New Foundation M	Q3	\$250,000	\$250,000	\$250,000
New Foundation N	Q1	\$150,000	\$150,000	\$150,000
New Foundation O	Q2	\$150,000	\$150,000	\$150,000
	Subtotal	\$550,000	\$1,050,000	\$1,050,000
Board Giving				
2016 Year-end Giving	Q2	\$25,000	\$25,000	\$25,000
	Subtotal	\$25,000	\$25,000	\$25,000
Major Gifts: New				
New Individual Donor A	Q3	\$30,000	\$30,000	\$60,000
New Individual Donor B	Q1	\$15,000	\$15,000	\$25,000
New Individual Donor C	Q2	\$10,000	\$10,000	\$15,000
New Individual Donor D	Q2	\$5,000	\$5,000	\$10,000
New Individual Donor E	Q2	\$5,000	\$5,000	\$10,000
New Individual Donor F	Q2	\$2,500	\$2,500	\$5,000
	Subtotal	\$67,500	\$67,500	\$125,000
TOTAL		\$1,442,500	\$1,942,500	\$2,250,000

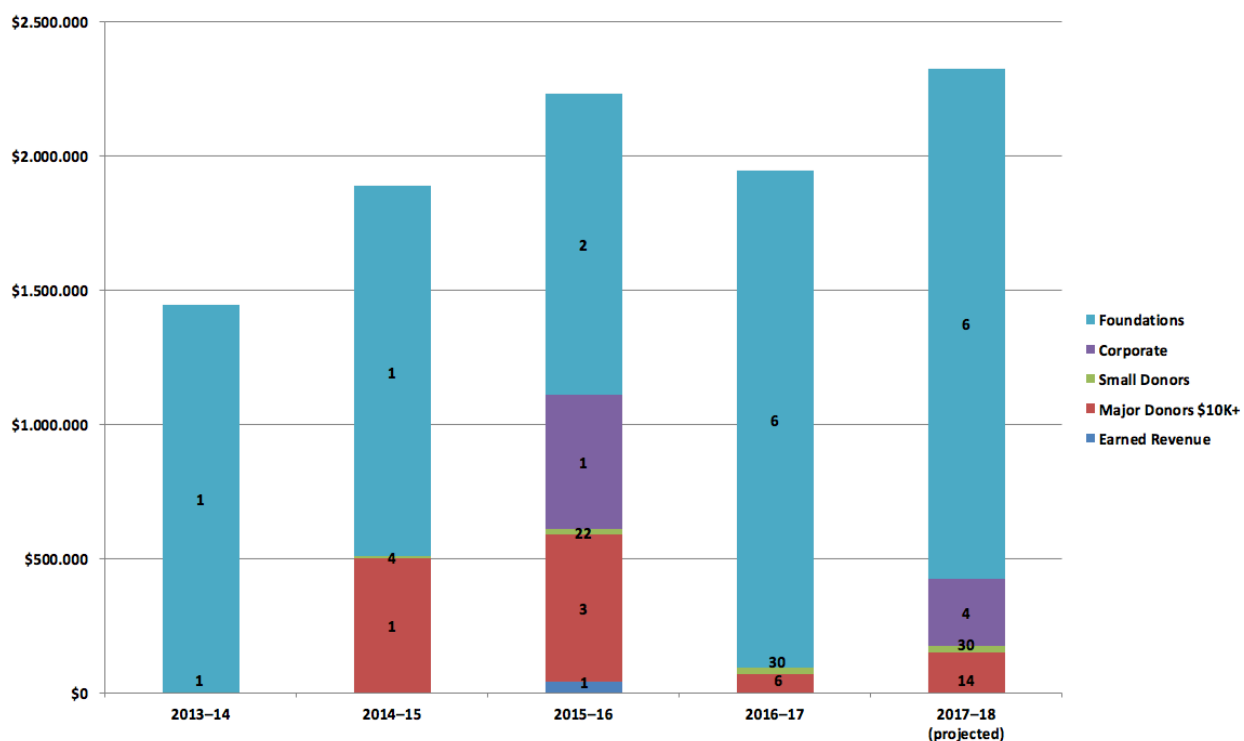
Notes:

[1] Verbal commitment exists as of April 2016.

Based on our current projection, Scenario B is the most likely scenario (also, the scenario that the current budget below is based upon). We will monitor our revenue stream during the first couple of months of fiscal year 2016–17. If we see that our revenues in Q1 turn out to be more like in

Scenario A, we will make adjustments to the budget at our stage-gate in late September. If we can exceed our revenue targets as described in Scenario C, we will start executing projects that are marked as “supplemental” in the sections above. In all cases, we will keep the board closely in the loop on the progress of our development work.

Figure 2: Yearly breakdown of revenue by funder type



Engagement Strategies

Institutional Giving (Foundations and Corporations)

Securing large grants from foundations and corporations will remain first priority in fiscal year 2016–17. We anticipate that these grants will remain our single largest revenue stream. We will continue to provide excellent stewardship to existing funders through timely and thorough reporting, and by regularly engaging them in our events and activities. Additionally, institutional funders can help amplify our messaging by showcasing our shared success.

The reach and scale of our Wikipedia-related work is relatively easy to communicate to donors and prospects through the numbers of participating students, amount of content added to Wikipedia, and the numbers of articles viewed; however, it is more difficult for us to clearly define our impacts on student learning. The metrics and data created through the new Research and Aca-

demic Engagement work will help us earn new institutional support by clearly communicating the impacts on the thousands of students enrolled in our Classroom Program each term.

To both sustain existing grants and to grow institutional support we will:

- Leverage products of the brand awareness campaign (enhanced visibility and messaging targeted to institutional decision makers)
- Continue to invest a large portion of development staff time in the areas of prospect identification, qualification, and proposal submission
- Leverage online research and tools (e.g. Foundation Center, trade media/Chronicle of Philanthropy, news outlets) to continuously add new institutional prospects to the funding pipeline
- Employ → moves management processes developed for the major gifts program
- Expand on monthly metrics to monitor the health of the prospect pipeline
- Fully develop an institutional giving calendar to both anticipate grant application giving windows and to provide better forecasting for internal Wiki Education Foundation resources (communications, finance, etc.)

Major Donor Communications and Activation Campaign

We will secure consulting services to conduct a major donor messaging and activation campaign with a primary goal of reaching high net worth individuals and securing new support for the Wiki Education Foundation (gifts at \$2,500 or above). The campaign will clearly define the Wiki Education Foundation value proposition and illuminate pathways to prospective donors with the overall goal to create lasting and measurable support for the Wiki Education Foundation.

Desired outcomes include:

- Major donor identification and qualification; answering the question: who are the high net worth individuals that are most likely interested in our work?
- Create unique messaging that targets the desired audience
- Develop a cultivation and solicitation strategy targeting high net-worth individuals
- Formalize → donor stewardship messaging to enhance donor retention
- Identify regional “champions” who can help leverage networks in specific, high-value markets (New York, Boston, Washington, D.C.)

East Coast Donor Stewardship and Prospect Cultivation Meetings

We will conduct quarterly meetings with both institutional and individual prospects as well as our our largest current donors. Strategies include:

- Meet in person at least once per year with current major institutional donors (\$100,000+ giving level)
- Meet in person with individual and institutional prospects as identified in the development pipeline

Board Giving

Working through the development committee and the board chair, our goal is to maintain 100% giving. Through regular meetings, the development committee will continue to actively assist staff in planning and developing fundraising-related events, including benefits and other events designed to maintain existing donors and actively assist in the identification, cultivation, solicitation and stewardship of donors and prospects.

Cultivation Events

We will host at least 3 highly-targeted fundraising events across the country. In fiscal year 2015–16 we experimented with three slightly different styles of event: an evening reception in a private home (Washington, D.C.), a small luncheon in a catered space (NYC), and cocktail-style engagement (San Francisco). We determined that the return on investment (both staff time and funds) was greatest in the smaller settings, with a highly curated guest list (preferably by the host).

Fiscal year 2016–17 event strategies include:

- Strategically selecting event hosts, host committee members, and event attendees in order to maximize fundraising potential
- Clearly stating it is a fundraising event in all materials & invitations
- Having the host share their personal story of why they support Wiki Education Foundation at the event
- Intentionally promote Wiki Education Foundation programming relevant to the demographic we are targeting
- Asking the event host up front to cover all costs of the event
- Exploring event “sponsorship” by an existing Foundation partner
- Utilizing a matching gift when possible

Expenses

As 2016–17 will build on the momentum of the Year of Science, the emphasis of our budget will be continuing our efforts of the Year of Science, analysis of the impact of “Year of” model and

increasing awareness of Wiki Education Foundation. We have not created a budget as audacious as last year and feel confident that our funding targets will be met. There will be no new positions hired and we will continue to set an internal stage-gate for the end of September to determine whether we are track or not with our fundraising targets. We will adjust our spending plan accordingly depending on our expected revenue. That plan will be presented to the Finance Committee and the board in October 2016.

Table 6: 2016–17 Plan revenue and expenses

	2016–17 Plan
Revenue	\$1,942K [1]
Expenses:	\$2,246K
General and Administrative	\$410K
Governance	\$108K
Fundraising	\$342K
Programs	\$559K
Programs Support	\$685K
Program Research and Academic Engagement	\$142K

Notes:

[1] The revenue shortfall of \$304K will be covered by projected \$479K carried over from fiscal year 2015–16.

Staffing

There are no planned staffing changes for 2016–17. We will maintain our 14 full-time staff and 1 part-time staff. Our other part-time staff (Data Science Intern) position ceases at the end of August 2016.

Figure 3: Staffing by functional area (headcount)

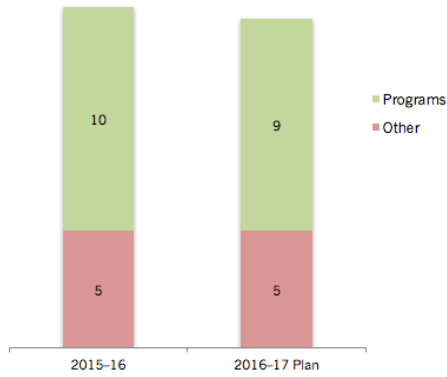
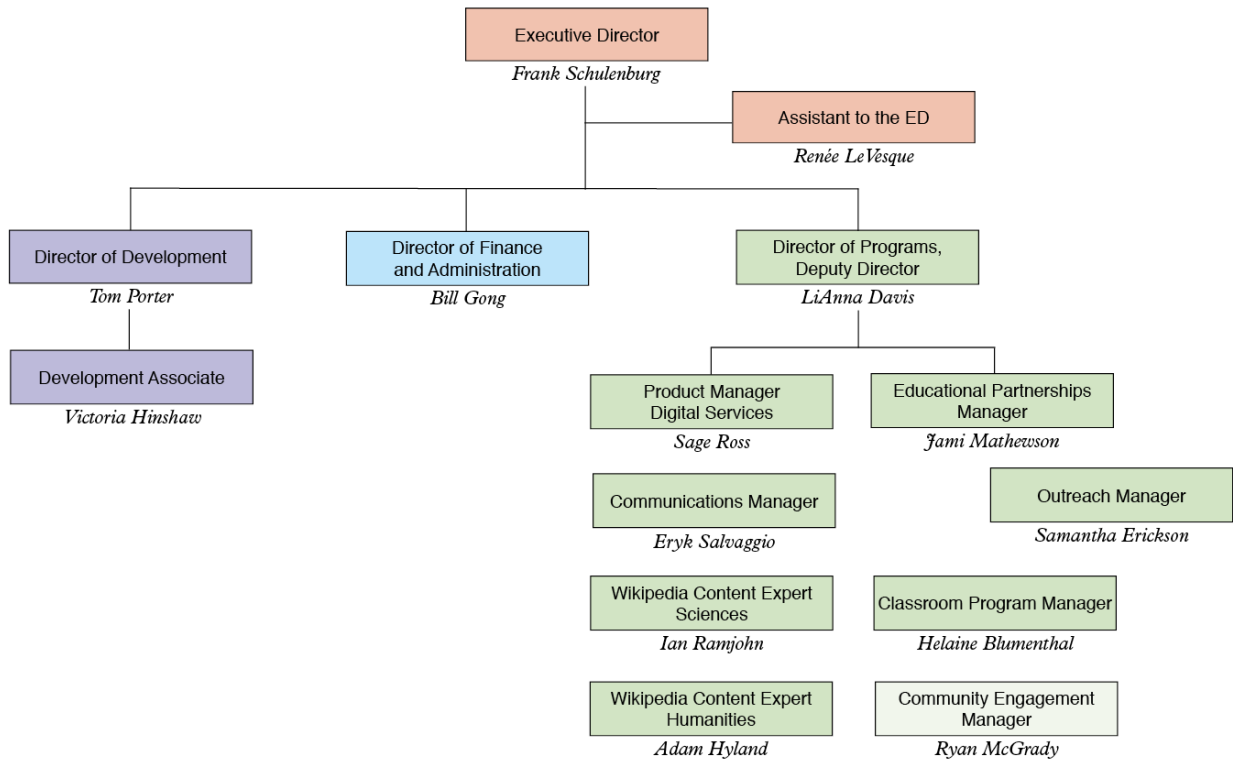


Figure 4: Organizational chart FY 2016–17



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Appendix

Risks considered in developing the 2016–17 plan

1. Wikimedia Foundation instability disrupts us

In early 2016, the Wikimedia Foundation experienced the biggest crisis in its history. The events that led to the departure of Wikimedia’s executive director and of large parts of their senior management had negative effects on the trust that potential funders have in Wikipedia-related projects. The inadequate handling of the crisis led to negative press coverage that overshadowed Wikipedia’s 15th birthday on a global scale. The scandal and its aftermath left the organization in a state of deep uncertainty about its own future.

Wikimedia’s performance and its public perception impact us in different ways. First, negative press hampers both our ability to raise funds as well as our recruitment of new program participants. Also, the instability of Wikimedia’s leadership team and the exodus of senior staff members makes it more likely that directions and goals change quickly which risks turning Wikimedia into an unpredictable partner.

We will continue our efforts on maintaining a positive relationship with the Wikimedia Foundation. Through frequent communication, in-person meetings, and sharing of learnings we’ll ensure that our ties to Wikimedia staff won’t get cut off. We’ll also continue to monitor Wikimedia’s activities in order to be prepared for a possible aggravation of the situation.

2. We don’t hit our fundraising targets

The fiscal year 2016/17 will be a critical time with regards to our financial situation as initial multi-year funding will run out. Although we’ve made a lot of progress in building relationships with new institutional prospects, we will be under substantial pressure when it comes to obtaining funding commitments.

As a precaution, we have worked hard on growing our pipeline of institutional prospects. Also, for the first time in our history, we will be able to transfer some of our existing funds into the upcoming fiscal year. And, maybe most importantly, we have dramatically cut back on our spending plans for 2016–17. Finally, based on the experience from this fiscal year, we have again decided to implement a stage-gate that will allow us to revise expenditures in case funding gets delayed or falls through.

While we are confident to receive funding as projected, we will have to closely monitor our revenue stream in order to make quick and decisive cuts if needed.

3. Increased pressure and workload has negative effects on staff

The upcoming year won't be easy on staff. Most importantly, they will have to deal with heavy cuts in tech spending which will decrease our ability to grow our programmatic impact at the same rapid pace as in the past. Workload on key staff members will most likely increase as a result of us trying to grow our impact none the less. Also, with us fighting a constant fight to secure funding, staff will be at risk when it comes to maintaining a positive outlook on the future.

In order to mitigate this risk, we will increase our efforts to inform everybody in the organization about our progress in development. We will have to strike a balance between communicating transparently and not making fundraising the predominant topic that everybody keeps thinking about.

Our staff with its unique skills and high level of dedication is our biggest asset. We'll have to stay away from both alarmism and overconfidence in order to keep trust and motivation at the current level.

Glossary

API	Short for "Application programming interface"; in our case a framework that allows external software to interact with our →Dashboard
Article Finder	A tool that will allow instructors and students to easily identify articles that need improvement
ask.wikiedu	A question-and-answer platform where instructors and students can find common questions and answers about our programs
Assignment types	Options for instructors teaching with Wikipedia. Includes writing/editing articles; translating articles; adding images, video, or illustrations; copy-editing; and critiquing
B quality level	A Wikipedia article that is mostly complete and without major problems, but requires some further work to reach good article standards
Bot	A software application that runs automated tasks

Code coverage	The portion of a software project's source code that is tested by the project's test suite. The more fully the code is tested, the fewer new bugs will slip through whenever changes are made
Commit	When a software developer is finished making changes on a particular bit of code, the action of moving that code into the official code base repository is called a commit. An increase in commits from one source means there is more development activity happening from that source.
Culture of development	Recognizes that both development and philanthropy are part of organizational culture, and that board and staff share a role in engaging and inspiring donors
Dashboard	At http://dashboard.wikiedu.org , our course design and management tool, also offering online trainings for instructors and students and access to →ask.wikiedu
Degree Qualifications Profile (DQP)	Lumina Foundation-sponsored effort that outlines a set of reference points for what students should know and be able to do upon completion of associate, bachelor's, and master's degrees – in any field of study. Addresses five broad categories of proficiencies
Diff Viewer	A software extension that will enable users of our →Dashboard to quickly review changes made to a certain article on Wikipedia
Donor cultivation cycle	Stages of donor cultivation; defined as the following stages: identified (as having alignment with our work), research (qualification), cultivation (active engagement and two-way conversation), solicitation (proposal submitted), proposal awarded, proposal declined, withdraw
Donor stewardship messaging	Broad suite of messaging that is directed at donors: grant reports, donor recognition, news, blog posts, or other mentions of Wiki Ed, the donor, the partnership, or the funded project
Edit war	Occurs when editors who disagree about the content of a page repeatedly override each other's contributions
Google Summer of Code	A program that offers post-secondary students the opportunity to contribute to open source projects during summer break
Independent study	A form of directed study that does not fit into a traditional academic course; in our case, a focused project for graduate students to work with faculty on topics not well-covered in

	Wikipedia
Moves management processes	The process by which a prospective donor is moved from cultivation to solicitation. “Moves” are the actions an organization takes to bring in donors, establish relationships, and renew contributions
On-wiki Year of Science Portal	The Year of Science communications and community collaborations hub on Wikipedia. It includes science-related news and events, information on how to get involved, our collaborations with →WikiProjects Women in Red and →Women Scientists, information about science-related Wikipedia contests we're sponsoring, open research resources, and other content intended for community use and development
Open Sym	Short for “International Symposium on Open Collaboration”; in 2015, the conference took place in the Presidio of San Francisco
Outreachy	A program that helps people from groups underrepresented in free and open source software get involved
Plagiarism checker	An automated tool that flags potential cases of plagiarism committed by student editors
Resource Finder	A dashboard feature for curating and searching a database of resources. Our vision for this project is to make it easy for instructors to find – and share – just the resources they need, such as handouts and example syllabi for their specific field
Revision scoring	A service developed by Wikimedia Foundation that uses machine learning techniques to analyze Wikipedia revisions. The revision scoring service is a foundation that we can use to build better ways of detecting edits that merit further review, as well as providing automated just-in-time feedback to editors
Sandbox	A space to experiment with the process of editing Wikipedia
Stage-gate	A point in a project or plan at which progress can be examined and any changes or decisions relating to costs, resources, etc. can be made; we use the term for the moment at which we decide whether we will be able to execute supplementary projects or whether we have to enact additional budget cuts (based on the results of our development work in the first months of our fiscal year)

Student learning outcomes	The expected knowledge, skills, attitudes, competencies, and habits of mind that students are expected to acquire at postsecondary institutions as part of their educational programs, activities, courses, or projects; in our case it pertains to the outcomes student gain by completing assignments from faculty teaching with Wikipedia
Valid Assessment of Learning in Undergraduate Education (VALUE) rubrics	A model for assessing whether postsecondary students are achieving key learning outcomes based on 16 rubrics ; a project of the Association of American Colleges & Universities
Wikimedia Commons	Wikipedia’s media repository
Wikimedia D.C.	The Wikimedia Foundation’s local chapter in Washington, D.C.
Wikimedia NYC	The Wikimedia Foundation’s local chapter in New York City
Wiki Playlist	A tool that enables readers to select their favorite Wikipedia articles and share this selection through social media
Wikipedia conflict of interest guidelines	These guidelines strongly discourage editing Wikipedia “in your own interests or the interests of an external relationship”. When our staff edit Wikipedia in their staff capacity, care must be taken to ensure that their edits advance the interests of the encyclopedia
WikiProject Medicine	A group of Wikipedians who are working to improve medical-related content on Wikipedia
WikiProject Women in Red	A group of Wikipedians who are working to turn “red links” (topics for which no Wikipedia article exists) about “women and their works” into articles
WikiProject Women Scientists	A group of Wikipedians who are working to improve the coverage and quality of biographies of women scientist on Wikipedia