



Wiki Education Foundation

2017–18 Annual Plan

Table of Contents

Looking back: 2016–17

Summary of 2016–17 Performance

Activities, Goals, and Targets

Core Programs

Program Support

Research and Academic Engagement

Revenue, Expenses, and Staffing

Looking ahead: the 2017–18 Plan

Overview

Key Initiatives in 2017–18

Activities, Goals, and Targets

Core Programs

Program Support

Research and Academic Engagement

Strategic planning for 2017–2020

Revenue, Expenses, and Staffing

Board Resolution

Appendix

Risks considered in developing the 2017–18 plan

Looking back: 2016–17

Summary of 2016–17 Performance

2016–17 has been our third year as an organization. Despite operating on a reduced budget, we were able to significantly increase our programmatic impact in the areas of student learning and adding quality content to Wikipedia. With regards to our mission, the past year has been the most successful to date.

At the end of 2016, our Year of Science initiative culminated with more than 6,300 students engaged in improving the English Wikipedia's underdeveloped science content while improving their writing, information literacy, critical thinking, collaboration, and online communications skills. The science students enrolled in our Classroom Program created 637 articles and improved more than 5,670. These articles have provided more than 300 million Wikipedia readers around the globe with free access to high-quality science information in 2016 alone. During the most active time of the year, we produced almost 6% of all science content on the English Wikipedia. Our Year of Science initiative has been so successful that volunteers in Brazil are gearing up for a similar initiative on the Portuguese Wikipedia in 2018.

At the same time, with more than 65% of the students being female, our Classroom Program continues to be single most effective tool for boosting women's authorship on the English Wikipedia. Students in women's studies courses have contributed content that balances the representation on Wikipedia, where the highest-quality biographies are more frequently accounts of men's lives and achievements. Students have contributed articles about notable female scientists, public health advocates, philosophers, psychologists, and screenwriters.

Preparing students for their future careers is a top priority in higher education today. In order to gain a better understanding of the employability skills developed through Wikipedia assignments, we launched a large-scale research study in 2016. Preliminary results show that 86% of our students thought a Wikipedia assignment was as or more valuable for developing critical thinking skills than a traditional assignment. 95% of students enrolled in our Classroom Program thought Wikipedia assignments were as good or better for improving their digital literacy and nearly 70% thought it was more valuable. 94% said the Wikipedia assignment was as or more valuable for learning about the reliability of online sources, 63% said it was more or much more valuable.

All of this has been made possible through the support of our funders, our highly motivated staff, the personal commitment of our board, and a positive relationship with Wikipedia’s community of longtime contributors.

Activities, Goals, and Targets

Our 2016–17 Annual Plan outlined specific activities, goals, and targets in three main areas: Core Programs; Program Support; and Research and Academic Engagement. We’ll report our work on each of these areas individually.

Core Programs

Goal: Recruit participating Classroom Program instructors and Visiting Scholar hosts



High-level view: Further improving the effectiveness of our recruitment efforts

The increasing demand in our services is a strong indicator that we’re already doing many things right when it comes to recruiting new instructors to our programs. Over the course of the past fiscal year, we have learned that outreach webinars, partnerships with academic associations, booths at conferences, campus visits, and efforts to improve our organization’s overall visibility are effective drivers of growth, while edit-a-thons are not.

In the future, we will continue our data-driven approach and also closely watch emerging trends like recruitment through word-of-mouth and increased visibility (organic growth).

The focus of the Educational Partnerships and Outreach team was to increase the visibility of teaching with Wikipedia in Wiki Ed’s programs through on-campus presentations, academic association partnerships, and webinars, with a special focus on Year of Science disciplines. We continued our data-driven approach to recruiting new instructors and new Visiting Scholars host institutions, while innovating around new types of partnerships. Following is a report on the activities outlined in last year’s plan.

- 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.
 - To date, we have hosted 9 outreach webinars with 468 attending instructors. Classroom Program instructors hosted us remotely to share our expertise and recruit their colleagues into the program. In this fiscal year, 11 courses in the Classroom Program were recruited from webinars run during the same time period. We've learned that tapping into existing program participants' networks enables us to get webinar attendees without spending any financial resources and with very little staff time beyond the presentations. We've found these virtual presentations are highly cost effective and will continue using them to recruit program participants.

- Establish partnerships with academic associations to promote the use of Wikipedia as a teaching tool in higher education classrooms within that discipline.
 - In FY 2016–17, we started a new partnership with the Association for Women in Mathematics (AWM). With the focus on the Year of Science in the first half of the year, we shifted away from formal partnerships in order to achieve short-term goals related to the campaign. We succeeded in our short-range goals thanks to our shift in activities, but at the expense of long-range goals that formal partnerships help us achieve. With a focus on maintaining current programmatic activities in the coming fiscal year, we will refocus on developing new partnerships to ensure long-term growth. During the year, however, engaging with current partners and sustaining their Wikipedia initiatives allowed us to target those disciplines and strengthen those relationships.

- Attend academic association conferences 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.
 - For FY 2016–17, we participated in the following 30 in-person events for outreach opportunities:
 - American Society of Plant Biologists Annual Meeting, July 2016
 - The Allied Genetics Conference, July 2016
 - Botany 2016, August 2016
 - Joint Statistics Meeting, August 2016
 - MathFest, August 2016

- Ecological Society of America Conference, August 2016
- American Chemical Society Fall Meeting, August 2016
- University of Mississippi campus visit, September 2016
- Puente Community College Program workshop, October 2016
- University of California, San Diego campus visit, October 2016
- National Women Studies Association annual meeting, November 2016
- American Anthropological Association annual meeting, November 2016
- American Geophysical Union annual meeting, December 2016
- American Historical Association annual meeting, January 2017
- Linguistic Society of America annual meeting, January 2017
- American Association for the Advancement of Science annual meeting, February 2017
- NWSA Regional Meeting, March 2017
- University of California, Berkeley Campus Visit, March 2017
- Academy of Criminal Justice Sciences annual meeting, March 2017
- Scholarship of Teaching and Learning conference, March 2017
- American Society for Environmental History conference, March 2017
- California State University, East Bay campus visit, March 2017
- American Chemical Society Spring Meeting, April 2017
- Association for Women in Mathematics Research Symposium, April 2017
- York University campus visit, April 2017
- Xavier University campus visit, May 2017
- Tulane University campus visit, May 2017
- Louisiana State University CxC Summer Institute campus visit, May 2017
- Fordham University campus visit, May 2017
- American Society of Plant Biologists annual meeting, June 2017
- Of the conferences where Wiki Ed staff presented and recruited new program participants, 15 were specifically related to Year of Science disciplines. At these events, we gave talks about the pedagogical benefit of editing Wikipedia as a classroom assignment, spoke to conference attendees at exhibit booths, and ran workshops to design Wikipedia assignments.

- From these events so far, we have recruited 46 courses into the Classroom Program. While outreach events result in new courses the first term following the event, they are even more productive the second term, after we've spent several months cultivating the instructor and helping them design their assignment to fit their personal course objectives.
- When we recruit instructors at STEM conferences, it takes more time to convert them into an active course in the Classroom Program. We believe this is because fewer STEM courses offer existing writing assignments compared to those in the humanities, but many of the science disciplines are trending toward a focus on science communication. At least 7 of the STEM conferences we attended this year had a major science communication track, and we spoke to instructors who are interested in assigning their students to write more but are wary of how to do so. This trend will benefit us because we have a good support system in place for instructors who have rarely asked students to write extensively.
- Investigate whether Wikipedia edit-a-thons are a good opportunity to recruit program participants.
 - During the Year of Science, we collaborated with the Association for Women in Science (AWIS) to run a series of Wikipedia edit-a-thons at AWIS chapters. The members ran edit-a-thons in October 2016 in honor of Ada Lovelace Day, inviting members and campus faculty to participate in adding new biographies of women in science to Wikipedia. Since edit-a-thons are highly attractive to non-Wikipedians, we believed we could offer a small amount of support in running the events in order to target attendees and recruit them into the Classroom Program. We supported the events virtually and asked attendees to create edit-a-thon pages on the Dashboard, which would give us contact information for any attending instructors. We learned that edit-a-thon facilitators were unlikely to follow through on using the Dashboard during their events, meaning we never knew who attended in order to recruit them into a like-minded project like the Classroom Program.
 - Similarly, in April 2017, we attended the Association for Women in Mathematics (AWM) Research Symposium at UCLA. Because of our partnership with AWM, which sponsors two Visiting Scholars, we agreed to facilitate their edit-a-thons in order to explore whether we could recruit the attending instructors into the Classroom Program, which we know is highly impactful to Wikipedia. The major learning coming out of this event was

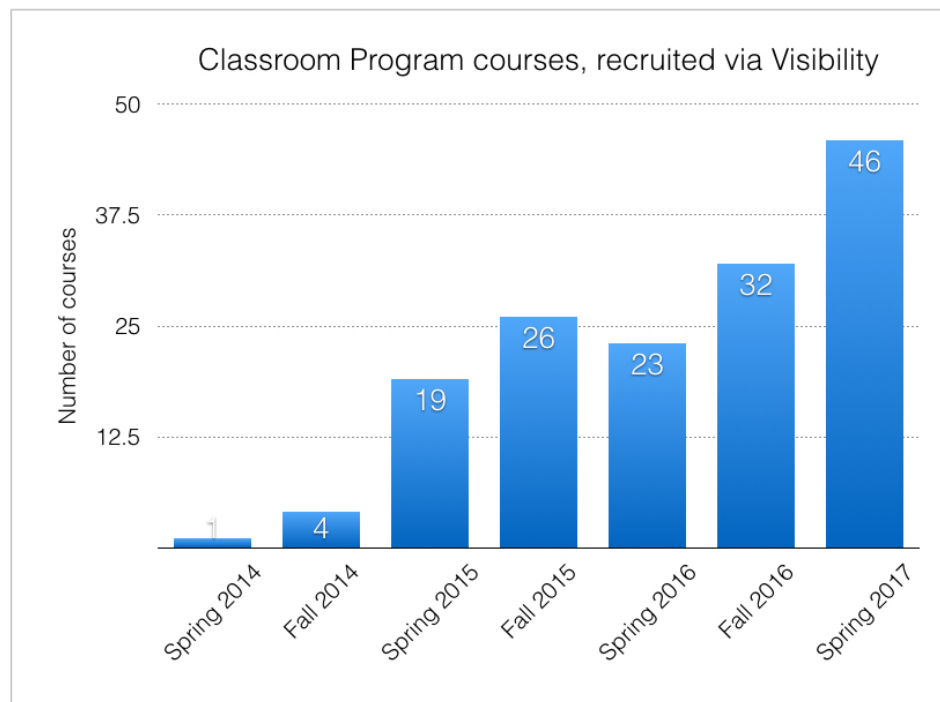
that attendees who may have been a good fit in the Classroom Program were not interested in thinking about their roles as teachers because they had come to learn something themselves. The attendees did learn how to start editing Wikipedia, as most of them started a new stub article, but they were not interested in conversations about amplifying that impact through their students.

- After these two sets of edit-a-thons, we've concluded that edit-a-thons are not an effective recruitment tool, and we will not support them in an effort to expand the Classroom Program.
- Experiment with new ways of engaging with academic association partners to increase scalability of partnership model.
 - In this fiscal year, we started a partnership with the Association for Women in Mathematics (AWM) with the explicit aim of participating in the Visiting Scholars Program instead of the Classroom Program. AWM members are mathematicians, so their participation in the Classroom Program would bring students to math articles, but few of them would be able to focus on women mathematicians' biographies in order to achieve the course objectives. Thus, we partnered with AWM to host a Visiting Scholar who would focus on writing and expanding articles about women in mathematics. For the first time, we distributed our outreach messaging to AWM's members instead of to Wikipedia editors, and we were surprised to receive 14 applicants for the position. In the end, the Community Engagement Manager selected two AWM members to learn how to edit Wikipedia's biography articles and improve the coverage of women in mathematics. So far, AWM has considered this partnership meaningful, and we expect high-quality outcomes on Wikipedia. This new model opens up a new partnership avenue, helping us diversify our partnerships and expand the program.
- Analyze efficacy of recruitment initiatives to determine long range plan for scaling outreach.
 - In preparation to reach the fall 2016 Year of Science goals for the Classroom Program, we analyzed our data from the previous year of outreach. We subsequently revisited the analysis in February 2017 with an additional 6 months of data. Overall, we learned the following:
 - Academic conferences are highly effective in recruiting new program participants, particularly if we need to target a specific discipline.

Members who attend a Wiki Ed presentation are highly likely to participate, but exhibit booths get us dozens more leads and potential participants. The exhibit booths are so effective, in fact, that while we will negotiate free or discounted spaces, we are willing to put money into conferences that align with our mission.

- Visiting university campuses to present to faculty produces fewer courses altogether, but they are still effective. To balance the efficacy of campus visits with a low input of financial and staff resources, we only visited universities and colleges where either a) we were already attending a conference nearby, reducing travel costs; or b) university faculty secured funding for our visit.

Figure 1: Classroom Program courses, recruited via Visibility (they came to us, rather than us coming to them)



- Wiki Ed’s efforts to make the organization and Wikipedia assignments more visible are working. In two years, we have nearly doubled the number of instructors joining the Classroom Program without meeting a Wiki Ed staff member at an outreach event.

- Word-of-mouth continues to influence Classroom Program recruitment. In the spring 2017 term alone, 47 new courses (out of 193 total new) joined Wiki Ed after a referral from one of our contacts or participants. In the past year, we have asked instructors to recommend a colleague, and we will continue facilitating this powerful word-of-mouth recruitment tool that brought nearly 25% of new participants in spring 2017.
- 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.
 - We recruited two campus faculty members at Fordham University to expand the program on campus, and fifteen months later, they were facilitating a Faculty Learning Community (FLC) with 13 other instructors on campus. During the first term of the FLC, Wiki Ed had supported 6 courses from this group, making this a successful pilot in our efforts to expand locally on campus. This group’s success is largely thanks to an on-campus faculty member who is dedicated to the project. She has hosted quarterly calls with the group and Wiki Ed, hosted workshops on campus, and helped faculty members utilize Wiki Ed’s tools in their assignments. Time investment from staff has been low, but the engagement between Wiki Ed staff and campus faculty has ensured high-quality courses in the Classroom Program, hopefully leading to retention of participating instructors.
 - While considering future support of similar groups, we should note that not all of them will have the right combination of on-campus staff availability, faculty interest, and organic growth to be worth Wiki Ed staff supporting and participating in the capacity shown at Fordham. However, we believe that with thorough vetting we can determine a “right fit” mentality and support new groups accordingly.

Goal: Systematically approach Classroom Program instructor retention



High-level view: Improving instructor retention

Retaining instructors in our Classroom Program is key when it comes to getting the most out of our initial investments in onboarding and training new program participants.

Early results of our experiments suggest that community-building efforts like guest blogging and staff office hours are among the most effective ways of increasing retention among our instructors. In future terms, we will have to further test our assumptions prior to making a final call on how to increase instructor retention in a systematic way.

In 2016–17, as we wrapped up and evaluated the Year of Science, we did so with a focus on sustainability, creating 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. Following is a report on the activities outlined in last year’s plan.

- 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.
 - Earlier this year, we consulted with Richard Knipel about the success of the New York contingent and how we might replicate it elsewhere. We concluded that the success of the New York contingent is in large part the result of a handful of active Wikipedians who live in the area and who are focused on education. Without these people on the ground, it will be difficult to replicate. Boston offers a different model though of instructor community building. While there are active Wikipedians there, several instructors have taken it upon themselves to become involved in Wikipedia and education. Again, this requires people on the ground who are motivated to form a community and maintain it. There may be other opportunities and models we can explore to form local communities of instructors teaching with Wikipedia, but this remains an exploratory question at this time. The challenge remains how to form local

communities of instructors teaching with Wikipedia who maintain themselves but adhere to Wiki Ed's best practices.

- Send mid-term check-in emails to first-time instructors, reminding them of our organization's support.
 - We sent check-in emails in Fall 2016, and we concluded that they were useful in reminding instructors that they can reach out to Wiki Ed for help during the term. But we decided not to use them in Spring 2017 because of the introduction of the newsletter and regularly scheduled Wiki Ed Office Hours; through these channels, we were already in regular communication with instructors and the midterm check-in was no longer necessary.
- Invite new instructors to blog for us on their experiences teaching with Wikipedia to increase affiliation with our organization.
 - Seven instructors have so far contributed to our blog, and many more have indicated their interest in doing so. While it remains to be seen whether guest blogging for us increases retention, it is a low staff time commitment that greatly enhances our communications and provides us with insights into the classes we support.
- Collaborate with Communications on increasing social media coverage of specific instructor's student work.
 - We notified instructors of when their students' work was featured in any of our communications. This was a low staff time commitment that instructors appreciated and which made them more aware of our social media presence.
- 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.
 - In 2016, we sent out 38 report cards. Roughly half of those who received report cards have taught again and half have not (though several of these plan on doing so in the future), meaning there not a large enough sample size to confirm whether report cards impact retention; however, our initial conclusion (though speculative) is that they have little to no effect and have discontinued them in favor of better leveraging existing instructors as collaborators at academic conferences and campus workshops. Before the outreach team went to various conferences, we notified relevant instructors

that Wiki Ed would have a presence there and encouraged them to seek out any Wiki Ed staff in attendance. We didn't do this systematically for every conference, and the outcome from the emails we did send was limited at best; thus, our conference schedule is now announced in the newsletter rather than in individual emails.

- Investigate an awards program for course achievements.
 - Due to time constraints, we did not pursue this during FY 16–17, but would like to during the next fiscal year.

- 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.
 - In Fall 2016, we ran two thematic webinars, “Making the Most of Your Wiki Ed Support” and “Inquiring Minds Want to Know: How Wikipedia is Unlocking Scientific Knowledge.”¹ Based on feedback from both webinars, it became clear that instructors wanted a forum in which they could ask questions about their Wikipedia assignment. As a result, we switched the format to Wiki Ed Office Hours in which instructors can drop in during a given time slot to speak with members of the Wiki Ed staff. We held two of these sessions in Fall 2016 and four during Spring 2017. Attendance at these sessions has been between 5 and 10. It's still too early to know if these sessions are having an effect, but it's a modest staff time commitment and provides staff with more interaction with instructors and insight into what they are most concerned with regarding their Wikipedia assignments. We plan to continue Office Hours during fiscal year 2017–18 and reassess it once we have more data.

¹ <https://youtu.be/04RPZJcEApU> and <https://youtu.be/3O48z09GY3E>



High-level view: Visiting Scholars Program

The Visiting Scholars Program has succeeded in delivering high-quality content to Wikipedia. However, in its current model, the program doesn't scale. The topic areas proposed by partnering institutions are very narrow, which makes it difficult to match these institutions with long-time Wikipedians. Also, long-time Wikipedia editors tend to have a narrow area of interest, which adds to this effect.

Based on these learnings, we are planning to adjust the model so we can scale the program's impact. We will start recruiting researchers and Ph.D. students and match them with global research programs (e.g. the Deep Carbon Observatory) or Academic Associations (e.g. the Association for Women in Mathematics). These expert editors will take our standardized online training and join the long-time editors in bringing Wikipedia articles up to high levels of quality. We will also experiment with stipends in order to expand the pool of Wikipedians who participate in our Visiting Scholars Program.

We continue to believe this program is an important part of our programmatic toolbox, offering a way to focus on article quality rather than quantity 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. Following is a report on the activities outlined in last year's plan.

- Expand our work with academic associations to include sponsoring Visiting Scholars
 - We partnered with the Association for Women in Mathematics (AWM), who sponsored two Visiting Scholars. This was unusual for the program in that the Scholars come from AWM's membership rather than from Wikipedia, and thus require training and a different style of support than usual. We're also going to work with the Deep Carbon Observatory (DCO), which will be a more traditional Visiting Scholars model in that we will look for an experienced editor (announced in the next few weeks, and hopefully placed before the end of the fiscal year). Prior to AWM,

Cochrane began a similar program under the Visiting Scholars umbrella, with health/medicine/gerontology experts being trained to improve aging-related articles. We identified several potential advantages to working with associations rather than libraries at educational institutions, but found that they are a better fit for an alternative model of Visiting Scholars which emphasizes passion for improving a subject over access to resources.

- 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
 - Wikipedian-in-Residence roles vary in their terms and activities but they are typically salaried positions with set hours and responsibilities directed by the institution. All of these aspects of Wikipedians-in-Residence contrast with Visiting Scholars, which is a volunteer position with no set hours and minimal intervention on the part of the institution. Importantly, Wikipedians-in-Residence rarely focus on improving articles directly (in no small part due to conflict of interest concerns). After comparing the Wikipedian-in-Residence role with our Visiting Scholar role, we decided to instead create a new pilot program with a new model, building on the work started with AWM, DCO, and Cochrane.

- Introduce assessment into the Visiting Scholar program structure, with an eye toward focusing on B-class or better output from Scholars
 - At the beginning of the fiscal year, Visiting Scholars informational materials and communications strategies were updated to emphasize a standardized goal: to improve articles to B-class or better. This goal was embraced by most of the sponsors and Scholars starting after that point, and some of those who had already started. We knew early on that we would need to arrange for article assessment in some cases where the Scholars may not be comfortable reassessing themselves. For articles that were not taken by their Scholar to “Good Article” or “Featured Article” status, Adam and Ian periodically reviewed work to evaluate whether articles could be considered B-class. The consistency with which Scholars attained this goal varied quite a bit, with the very first Scholar starting in the fiscal year focusing almost entirely on list articles, which do not operate according to the same assessment scheme. Many sponsors embrace the idea of quality, but did not seem excited to push for B-class. We find that this is still an imperfect

measure of this program’s impact, so we are reframing this for next fiscal year.

Goal: Evaluate Year of Science

To fully understand the impact of the Year of Science, we focused on evaluating outcomes achieved during the Year of Science, what worked and what didn’t about our approach, and whether these “Year of” initiatives were a good direction for Wiki Education Foundation. We did this through two main initiatives: our data science internship, and a Year of Science retrospective.

In summer 2016, we hosted a full-time data science intern who evaluated the specific impact Wiki Ed students have on content areas. For the Year of Science, we determined our students added nearly 6% of all the content added to the English Wikipedia in the sciences during the busiest month of the spring 2016 term, April. We also determined that during the busiest part of the term, our students are adding 10% of all previously underdeveloped academic content area. This research confirms our belief that Wiki Ed’s programs are having a massive impact on the availability of content on the English Wikipedia.

As the Year of Science wrapped up, each department pulled together short presentations about activities, outcomes, and learnings from their area of the Year of Science. The major themes from this retrospective are woven throughout next year’s annual plan, and a full evaluation report has been published on Meta in June.²

Impact Targets

Rather than set goals for each program, we set overall impact targets:

Table 1: 2016–17 Impact Targets: Plan vs. Projection

Target	Goal	Projection
Number of students having an enriched, reflective, and productive learning experience	12,500	13,500
Number of Wikipedia articles improved	12,500	12,600
Number of articles on women scientists improved during Year of Science	100	125

² https://meta.wikimedia.org/wiki/Wiki_Education_Foundation/Year_of_Science_evaluation

Number of words added to articles	9 million	9.2 million
Number of articles improved to B quality level or higher	80	65

Program Support

Goal: Maintain excellent technical support system for program participants



High-level view: Improving our Dashboard course management system

In order to improve our Dashboard course management system without making larger monetary investments, we've tried two main approaches: mentoring new developers, and collaborating with Wikimedia's existing developers.

We learned that longer-term commitments like Outreachy/Google Summer of Code are needed in order to produce results that justify our initial investments in bringing new software developers up to speed. We also learned that the Wikimedia Foundation's developers don't have the capacity or Ruby skills to create new features that fully meet the needs of our platform's global user base.

Given our own success in building features like the in-dashboard Diff Viewer or the new authorship highlighting feature, we are confident that expanding our own capacity in further improving our platform is the best way of meeting the needs of a growing number of users. Wiki Ed being both responsible for product management and development of the Programs & Events Dashboard will be a more powerful option than technical collaboration or mentoring.

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 our online

training, and all program participants through a survey functionality. Following is a report on the activities outlined in last year's plan.

- Work with technical partners to ensure maintenance of a high-quality Dashboard product for program participants.
 - We worked less than anticipated with technical partners, but overall the Dashboard user experience for our program participants has continued to improve. We've addressed some of the most-requested needs and biggest sources of confusion in the Dashboard. (We've accumulated a fairly significant amount of design debt for the Programs & Events Dashboard, however.) Performance ended up being a significant focus, and we've made considerable improvements in the page load speed throughout the Dashboard, along with a dramatic reduction in the lag time before new edits show up on the dashboard. Bug fixes, design improvements, and a continuous effort to improve usability resulted in winning praise from former critics among our board members and participating instructors.

- Continue adapting the Dashboard to better meet the needs of instructors, student editors, and our staff.
 - In collaboration with the Classroom Program team, we did a major timeline / wizard update for Fall 2016. We made a smaller batch of updates before the Spring 2017 term as well. For instructors and students, we added several new features focused on viewing and evaluating student work: The in-dashboard Diff Viewer, Article Viewer, and visualizations of article history – including graphs of both “Estimated Completeness” and edits over time. For staff, we added search features, new automated alerts, and Salesforce integration that lets the dashboard automatically keep course statistics and details in-sync with our Salesforce records. We made significant updates to the survey system to accommodate our first student survey and the associated IRB-governed research project.

Figure 2: The new authorship highlighting feature makes grading much easier

The screenshot shows a Wikipedia article for 'Suramin'. The article content is color-coded to show authorship. The 'Adverse reactions' section is highlighted in light blue, 'Pharmacokinetics' in light green, 'Chemistry' in light orange, and 'Mechanism of action' in light purple. The sidebar on the right contains a table of identifiers:

Routes of administration	by injection only
ATC code	• P01CX02 (WHO) • QP51AE02 (WHO)
Legal status	
Legal status	• US: not FDA approved
Identifiers	
IUPAC name	8,8'-[(Carbonylbis[imino-3,1-phenylene]carbonyl imino(4-methyl-3,1-phenylene)carbonylimino)]di(1,3,5-naphthalenetrisulfonic acid)
CAS Number	• 145-63-1 ✓
PubChem CID	• 5361
IUPHAR/BPS	• 1728
DrugBank	• DB04786 ✗
ChemSpider	• 5168 ✓
UNII	• 6032D45BEM
KEGG	• C07974 ✗
ChEBI	• CHEBI:45906 ✗
ChEMBL	• ChEMBL265502 ✓
ECHA InfoCard	100.005.145
Chemical and physical data	
Formula	C ₅₁ H ₄₀ N ₆ O ₂₃ S ₆

At the bottom, the 'Edits by:' section shows a list of contributors: SF355317, Rifunk928, Aneelamr, and Rtcastil. A 'View on wiki' button is also present.

- Ongoing efforts during the remainder of the year include rollout of a first version of Authorship Highlighting, shown above, which will make it easier for instructors to see which parts of an article were contributed by which students, and continued testing of a potential chat feature. Authorship Highlighting rolled out in April; the chat feature is on the backburner, and may be in a state to roll out further over the summer.
- Building out features and making adjustments this year – even without sustained involvement from experienced contractors as in the previous years – has made Sage Ross, our product manager, more confident in the capacity of the Dashboard platform to accommodate further change and development; despite some modest architecture problems that remain, new features are becoming easier to implement over time.

- Investigate potential Dashboard project mentorship in technical programs like Outreachy or Google Summer of Code, and engage with the MediaWiki technical community to encourage more volunteer development projects on the Dashboard.
 - Sage collaborated with Wikimedia design researcher Jonathan Morgan to mentor Sejal Khatri for a successful Outreachy internship that brought User Profiles to the dashboard. We have up to three potential internships on the horizon – including the possible return of Sejal for a Google Summer of Code internship. Sage also mentored for Google Code-In, with many valuable contributions from high school students, and has participated in the AgileVentures software development community in recent months. In the process, we've considerably streamlined the onboarding process and documentation, making it more consistently smooth for new developers to get an environment set up and begin coding.
 - We've continued collaborating with Translatewiki, and at a low level – mostly on the internationalization front – with other developers in the MediaWiki community. Early in the year, Sage engaged in some efforts at active engagement/recruiting of volunteers, but saw little traction. After that, we refocused our efforts on other technical communities – in particular, the Ruby on Rails-focused AgileVentures community.
 - Some key things we've learned:
 - Mentoring, while time-intensive, can potentially be a net-positive. Setting aside small tasks for newcomers to get started can be very effective as a way to help new developers dive in and stick around, but a longer-term commitment such Outreachy/Google Summer of Code is what it takes to accomplish more development than what could have been done alone in that time. However, mentoring short-term or intermittent contributors is a useful opportunity to improve mentoring skills, learn from others, and streamline the developer experience.
 - Volunteer development and mentoring probably do not have the potential to dramatically enhance our technical capacity, but have been moderately beneficial so far and may become more so over time.
- 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.

- We collaborated with Wikimedia’s community tech team to build the baseline ‘Campaigns’ features – primarily for the Programs & Events Dashboard – and to update the course system to handle edit-a-thons with specific start/end times. This work went more slowly than expected, and the community tech team decided not to continue work on the Dashboard after that. In particular, our technology stack of React and Rails/Rspec made for a steeper learning curve than we anticipated for developers coming from the Wikimedia technical ecosystem.
- Wikimedia does not have developers or product managers tasked with understanding and meeting the needs of the main users and potential users of the Programs & Events Dashboard – global education program participants, edit-a-thon organizers, and others running outreach events. Because of the complexity of both the needs and the technology involved, we expect that in the future, working with Wikimedia on a contract basis for Wiki Ed to do both product management and development of Programs & Events Dashboard will be a better option than technical collaboration.
- 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.
 - In light of the mentorship experiences above, as well as discussions with a code bootcamp about the potential for this kind of program, we have determined that the learning curve – in terms of both diverse technologies used and orienting new developers around the purpose and features of the Dashboard – makes this kind of project infeasible for the dashboard.

Targets

- 97% code coverage for server (Ruby) code (baseline: 91%)
 - We’ve continued to maintain a high standard for our ruby test suite, with ~97–99% test coverage throughout the year. At last check in early April, we are at 99.5%.
- 90% code coverage for client (JavaScript) code (baseline: 57%)
 - During the first half of the year, we made considerable progress with improving our JavaScript codebase, completing a conversion from CoffeeScript to pure JavaScript. This was important for the long-term maintainability and accessibility of the dashboard codebase, and was also a prerequisite to accurate code coverage metrics, since CoffeeScript is incompatible with much of the JavaScript testing and plugin ecosystem. At

that point, we found that the real coverage value for our JavaScript test suite was ~40%. Added tests have since brought that up to 53%. However, with fewer resources for contract development than planned, we decided to de-prioritize the goal of improving our JavaScript test suite as of January 2017, to focus on feature development and mentorship of new developers. One thing worth noting is that improvements in our Ruby test suite have made the browser-based tests of JavaScript features much more reliable and thorough; JavaScript errors will now break our Ruby tests, resulting in practical terms in a much better-tested and cleaner JavaScript codebase than we had at the beginning of the year – despite this nominal decline in coverage.

- Increase commits to Dashboard code base from Wikimedia Foundation staff to at least 136 (baseline: 68)
 - Actual: 113, with no additional contributions expected.
- 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)
 - Year to date: 20 contributors, ~280 commits. This represents a combination of: Outreachy/GSoC internships and internship applicants; AgileVentures volunteers; Google Code-In contestants; and internationalization/right-to-left layout contributions from the Wikimedia community.

Goal: Communicate Year of Science and other program outcomes

A major part of the Communications work was to continue activities in support of the organization and its programs, and in particular of the Year of Science initiative. This work was crucial in raising Wiki Education Foundation's profile in the media, for participating instructors and potential donors to our organization. Following is a report on the activities outlined in last year's plan.

- Engage external media (including independent blog posts, media coverage, academic texts, and partnership newsletter articles) to cover Wiki Education Foundation's programs and impact.
 - Wiki Ed hired external media firm PR & Company to run a campaign in spring 2017 that resulted in two pieces on NPR and one in the Pacific Standard. This media coverage was instrumental in recruiting more new classes through visibility efforts (see Classroom Program section above).

Additionally, Wiki Ed was covered in more than 30 other publications, highlighting the impact and reach of our program.

- Highlight student-authored Year of Science articles on our blog and in our social media channels.
 - We featured student work from the Year of Science regularly in blog Roundups through the end of the Year of Science, and less frequently since. Social media channels point to our blog posts and we have also drawn attention to stand-out student work when, for example, a student article has appeared in the DYK section of Wikipedia's Main Page.
- Increase quality, quantity, and readership of blog posts on Wiki Education Foundation's blogs, especially those focused on Year of Science content.
 - Our blog traffic significantly increased during the Year of Science. We averaged just under 2,000 visitors per month to our blog in 2015, and that number increased to just over 3,500 visitors during 2016's Year of Science. This dramatic success helped us easily meet our page view goals for our Year of Science content.
- Create proposals and reports on programmatic impact for the development team.
 - Communications continued to play an important role as a partner for the development work, generating letters of intent, proposals, and reports for funders.
- Collaborate with development team on communications elements of major donor activation campaign.
 - The major donor activation campaign was put on pause during the stage-gate.

Targets:

- 35 external media engagements (baseline: 28 from 2015–16)
 - We are projecting at least 40 external media engagements by the end of the fiscal year.
- 200 student-authored Year of Science articles highlighted (baseline: 100 from Spring 2016)
 - We are projecting to highlight around 200 student-authored articles on Year of Science topics.

- Our own science-related content read by more than 7,000 readers (baseline: 5,500 readers from 2015–16)
 - Due to the success of our visibility work, we had already exceeded 10,000 readers by the end of Q2.

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

Communications also played a key role in assisting the Core Programs initiatives to recruit and retain instructors in our Classroom Program. Ongoing communications work directly supported the Classroom Program initiative, and it is important to acknowledge its crucial role in the success of the Core Programs team as they grew the number of program participants. Following is a report on the activities outlined in last year’s plan.

- Create a postcard about our programs that can be a low-level giveaway at conference booths.
 - This project was removed at the stage-gate.
- Work with instructors who have expressed interest in guest blogging for us.
 - Thanks to targeted emails, and newsletter recruitment, we've worked extensively with instructors interested in blogging for us.
- Refine instructor onboarding process to simplify complex steps and remove current roadblocks to scaling.
 - Text changes to Wiki Ed’s website, the assignment design wizard, and course output for the Dashboard simplified the process for instructors.
- 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.
 - We sent out four newsletter editions this fiscal year. The first was in February, including the planned content and more, and followed by another edition in March, April, and May.

- Create additional discipline-specific handouts for student editors, and maintain current line of high-quality printed support handbooks for instructors and students in our program, mailed to program participants who request them.
 - We project to finish four new discipline-specific handouts this fiscal year. These handouts remain popular with our program participants.
- Pilot small social media advertising campaigns aimed at reaching new instructors who may be interested in teaching with Wikipedia.
 - We did a very small pilot on Facebook to test if sending instructors to the NPR article would help lead them to teach with Wikipedia. Our results showed that while it drove a lot of traffic to NPR, it did not result in new contacts for our database. We want to continue exploring social media advertising that sends people directly to us.

Targets:

- Postcard about our programs created and printed, July 2016
 - This was discontinued at the stage-gate.
- 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)
 - While we project more than 20 participating instructors are interested in writing blog posts, we do not anticipate that all of them will finish the blog posts before the end of the fiscal year. The idea remains intriguing to instructors, but the actual follow through remains a challenge.
- Distribution of at least four email newsletters; evaluation of efficacy of this medium for reaching instructors, as determined by end-of-term survey
 - We expect to complete this goal.
- Creation of four new discipline-specific handouts (one per quarter each quarter)
 - Quarter 1: Linguistics; Quarter 2: Political science; Quarter 3: Books; Quarter 4: Films/television.
- Evaluation of social media advertising pilot completed, with next steps determined, January 2017
 - We are planning to continue this pilot next fiscal year.

Goal: Maintain high level of support from Wikipedia Content Experts



High-level view: Providing Wikipedia Content Expert support to a growing number of instructors and students

Over the course of the past couple of years, our Wikipedia Content Experts have been providing vital support for instructors and students. Given the strong increase in new instructors being interested in teaching with Wikipedia, we are now approaching a point where the needs of our users will exceed our current capacity of providing quality support and handholding.

Based on these facts, we will have to make further investments in our Dashboard course management system in areas that allow our existing Wikipedia Content Experts to be more effective in supporting a growing number of classes.

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 further improve articles. Our humanities Content Expert had to go on extended medical leave for a portion of the Fall and Spring terms; this forced us to onboard temporary Content Experts, both of whom are experienced members of the Wikipedia community, in November–December and March–May. Operating with only one experienced Content Expert during our largest cohort (up to that point) proved challenging and probably had an impact on the quality of support we were able to provide. Following is a report on the activities outlined in last year’s plan.

- Create lists of articles on course-related topics needing improvement.
 - We created a new training module to help instructors compile their own lists of course-related topics needing improvement. Compiling lists for instructors has always been a time-consuming activity that doesn’t scale well. Creating a new training module gives instructors the tools to compile

their own lists, building on their own expert knowledge of the subject area. When instructors need additional help, we are able to build upon the understanding gained through the training module.

- Answer questions from student editors and instructors.
 - A “Get Help” button was added to the Wiki Ed Dashboard in June 2016 and came into active use during the current fiscal year. This button allows a logged-in student (or instructor) to contact the Content Expert associated with their class via email. A similar help button is also added to student sandboxes which allows them to post to their Content Expert's talk page on Wikipedia. These tools allow students to direct their questions to the right people, and allow us to efficiently respond to requests in a timely fashion. Functionality of both these tools was refined during the Fall term.
 - We also built up a knowledge base at ask.wikiedu.org which allows us to easily direct students to answer common questions and worked with the Communications Manager to improve our responses.
- Monitor student activity on-wiki, attempting to head-off potential incidents.
 - The Dashboard allows us to monitor student activity on Wikipedia. In the early part of the term (August–September and January–March) we monitored student work proactively as the students became active on Wikipedia. During the busy part of the term (October–December and April–May) monitoring was done more reactively with emphasis on work moved into mainspace.
- Provide detailed constructive feedback to student drafts.
 - When requested by instructors, we provided detailed feedback to students on their drafts. As the program has grown (to more than 6,000 students in the Fall term, with more than 7,000 expected in the Spring) it is no longer possible to provide this sort of feedback for more than a fraction of the participants.
- Address any incidents that arise promptly and to the satisfaction of both participants and the Wikipedia community members involved, as appropriate.
 - Over the past two and a half years we have developed a relationship with the Wikipedia community that has improved our ability to address potential incidents. Many Wikipedians who in the past would have complained about

student work at various venues now contact us directly when they see potential problems with students. Potential plagiarism alerts, generated by the Dashboard, are emailed to Content Experts. This allows us to efficiently evaluate the issue, deal with the problematic content, warn students, and direct them to our training module on plagiarism and copyright.

- Identify good student work for use by outreach, communications, and development.
 - Good student work was identified and added to course records on Salesforce. Short summaries were added and work that was good for use in presentations was identified. Good student work was described in the monthly reports and used as the basis for “Roundups” on the Wiki Ed blog.

Targets:

- 90% satisfaction rate overall from instructors for support received from Wikipedia Content Experts (baseline: 85%) and 90% satisfaction rate in Wikipedia Content Expert feedback on student drafts, from instructors who received this support (baseline: 85%)
 - Due to a technical error, no responses to these questions were collected from the Fall instructor survey. This has forced us to rely on proxy measures of satisfaction – primarily, the fact that no instructor indicated that they were not teaching with Wikipedia again because of the poor level of Content Expert support.
- 90% of all incidents are resolved within five business days (baseline: 90%)
 - 90% of all incidents were resolved within five business days.

Supplemental goal: Create elements of Dashboard API

With limited developer capacity, we were not able to work on a general-purpose Dashboard API this year. However, we completed a more narrowly-scoped series of features that provide for most of the automated data sharing with Salesforce that we had planned as part of the large Dashboard API project. We have not yet investigated the requirements of potential Canvas or Blackboard integrations. Given that the Salesforce data sharing feature was easier to build than expected, exploring course management system integrations one at a time with narrowly-scoped features for each integration will probably be a better option in the future than building a general-purpose export API.

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

In this category, we made modest progress on tools for instructors (and students, and Content Experts) to more easily visualize and evaluate student work. An initial version of a DiffViewer was added to the Dashboard during the Fall 2016 term. Before the Spring 2017 term, we added an initial version of the ArticleViewer, to quickly view the current state of an article without leaving the Dashboard. In mid-April, we added initial version of authorship highlighting to the ArticleViewer, allowing instructors to see which parts of an article were contributed by which students. Our limited designed and development capacity means that these features are not as refined as they ought to be, and we still need to update the Dashboard user interface design to make these key features more discoverable.

Research and Academic Engagement

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



High-level view: Demonstrating our impact in the area of student learning outcomes

In 2016, we started a large-scale research project aimed at measuring our Classroom Program's impact on student learning outcomes. We know that better student learning outcomes (compared to the outcomes of traditional assignments) are the main incentive for new instructors to join our program. We also learned that a specific group of funders is interested in supporting programs that either deliver employability skills (like critical thinking, online collaboration, and communication skills) to the next generation's workforce or have positive effects on society in general (as is the case with media literacy skills).

We learned that we're able to successfully complete a research project that goes beyond what had been done so far in the area of studying student learning outcomes. In order to make our findings even more meaningful,

we are planning to explore ways of continuing our research efforts, so we can track the positive effects on student learning over an extended period of time.

Over the fall term, we designed, collaborated on revisions, submitted and received IRB approval, and implemented a three-part survey as well as 12 focus groups to assess various learning outcomes, attitudes, contexts, and skills transfer for students completing Wikipedia-based assignments. One major change that we implemented was the use of incentives to encourage students to take the survey; we had not anticipated such a low response rate in the beginning, but feel like the incentives improved the responses. Students seemed not to respond to or read their emails in a timely fashion, which should be considered in future research endeavors when attracting participants.

We anticipate publishing an executive summary outlining preliminary findings and information about the study, to be released alongside the data set, in May.

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 encouraged more communications work about the pedagogical benefits of teaching with Wikipedia, including teaching and learning conference submissions and blog posts.

Targets:

- Successful submission of student learning outcomes research through peer-reviewed process accepted at 2 teaching and learning in higher education conferences, Q4
 - The research has been accepted at three conferences, two of them teaching and higher education focused. It is under review at two others. We presented the data at one conference, and will present again in late April as well as in June. We are currently working on completing a draft of a journal article with Matthew Vetter for a top-ranked journal, as well as working

with three other potential authors on conference and journal submissions.

- 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)
 - We expect to have 8 blog posts mentioning student learning outcomes published by the end of the fiscal year.
- 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)
 - 7 of our external media engagements mentioned student learning outcomes and the benefit of teaching with Wikipedia.
- 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.
 - Wiki Ed sponsored scholarships for up to 20 academics who attended WikiConference North American 2016 in San Diego (the scope expanded beyond the USA). These academics presented in a special peer-reviewed track for the conference. We are also planning a teaching with Wikipedia pre-conference workshop at Wikimania 2017 in Montreal to recruit new program participants and have submitted several session proposals about our learnings from the last year.

Revenue, Expenses, and Staffing

Revenue



High-level view: Improving our revenue model

Although we've been able to hit our initial fundraising targets, last fiscal year has been the toughest so far with regards to revenue and cashflow. Incentivizing new donors through large-scale initiatives like our Year of

Science has been a success, yet the resulting revenue of similar campaigns won't be sufficient when it comes to creating a sustainable financial future for our organization. Also, our efforts in recruiting major donors are still at a too early stage for generating meaningful revenue.

Based on these learnings, we cleared the way for participating in the Wikimedia Foundation's Annual Plan Grant program. Wikimedia is benefitting greatly by our work and the help of the Wikimedia Foundation will be key in sustaining our efforts of delivering high quality content to Wikipedia's millions of readers while significantly increasing Wikipedia's number of new editors (especially with regard to women, who are still strongly underrepresented among Wikipedia's contributors).

Last fiscal year's plan called for raising a total of \$1,942,500. When we reached our internal stage-gate, we adjusted that goal to \$1,403,000. As of the time of the writing of this plan, we're projecting a total revenue of \$1,967,529 at the end of the fiscal year.

Foundation donors keep making up the largest majority (94%) of our revenue. About a third of the revenue from foundations came in through the second round of Year of Science funding, with Simons Foundation's \$480,000 two-year grant being our biggest single grant in that area. We also secured an unrestricted \$500,000 two-year grant from the William and Flora Hewlett Foundation through their Open Educational Resources program. The Stanton Foundation, one of our long-time supporters, provided us with additional \$300,000 in unrestricted funds.

The revenue through corporate gifts did not meet our expectations. We had planned to raise \$250,000 and came in at only \$70,000. The difference is based on Google's shift toward a new direction in funding. Although we raised significantly less money through corporate donors than initially expected, we learned that corporate donors are very attracted by how our programmatic efforts improve students' employability skills like critical thinking, writing, and collaboration. Some of our corporate prospects were also interested in how our programs improve the public's understanding of women scientists and how Wiki Ed's Classroom Program is the single most effective way of bringing new women editors to Wikipedia.

Table 2: 2016–17 Revenue Sources

Revenue source	Total amount (projected)	Percentage
Foundations	\$1,879,000	95.5%
Corporate	\$70,000	3.6%
Individual	\$13,529	0.6%
Fees for service	\$5,000	0.3%

In order to increase our capacity in the area of major donor fundraising, we tried two different approaches. In the first quarter, we started with an in-house major donor acquisition campaign. We identified about 60 high-net worth individuals and contacted them through highly personalized letters and follow-up phone calls. After we found out that this approach didn’t work as expected, we changed direction. In the second quarter, we launched our first individual donor acquisition mailing, targeting more than 10,000 high-net worth individuals that we had identified through WealthEngine, an online prospect research service. Our goal was to improve our visibility among major donor prospects and to slowly build a pipeline of high-net worth individuals who are interested in supporting our work. Our biggest individual donation coming in through this mailing campaign was \$5,000. In addition, the campaign helped us to identify a number of individuals that are favorable of our mission, so we can follow up with these individuals at a later point.

Table 3: 2016–17 Development Targets: Plan vs. Projection

Target	Projection	Notes
Increase the number of institutional donors from 3 to a minimum of 5	5	We increased the number of institutional donors from 3 to 5
Establish major donor campaign and secure at least 6 donors giving at \$10,000+	No	We created a direct mailing campaign, targeting 10,000 high-net worth individuals. However, our biggest gift came in at only \$5,000
Increase our prospect pipeline size by	Yes	We increased our prospect

50%		pipeline from 20 to 85 (both institutional and individual donors)
Maintain at least 25 major prospects in the cultivation stage (foundation and individual, each) throughout fiscal year 2016–17	No	While we had 25 major prospects in cultivation stage at some points during the year, we didn't succeed at maintaining that number throughout the whole year
Maintain 100% participation by Board of Directors	Yes	We maintained 100% participation by our board members

In December 2016, Executive Director Frank Schulenburg and a sub-group of Wiki Ed's board had in-depth conversations about different future options to receive additional funding. As a result, we decided to ask for funds through the Wikimedia Foundation's annual plan grant program. Wikimedia continues to be the biggest beneficiary of our work, with – during our busiest months – almost 10% of new content in select areas being contributed by our students. In the past, several other institutional funders had shown little understanding that Wikimedia benefited the most but didn't play a role in funding Wiki Ed. That's why, in early 2017, we started to lay the foundation for a closer partnership with Wikimedia: we strengthened our relationships with key staff, participated in events like the Wikimedia Conference in Berlin, and worked on ensuring our eligibility for Wikimedia's annual plan grants. As one of the immediate results, we were able to secure a Simple Annual Plan Grant of ~\$100,000 in May 2017.

In early 2017, we started preparing for a large communications and activation campaign. Supported by a local communications firm in San Francisco, we worked on honing our unique value proposition in the context of “fake news” and “alternative facts.” We expect this campaign to launch in the first quarter of fiscal year 2017–18.

Given our limited capacity to prepare such events (with Development Associate Victoria Hinshaw leaving the organization in July 2016 and our decision not to re-fill that position), we decided to not host any in-person prospect cultivation meetings.

Expenses

As we secured multi-year funding that helped to stabilize our future needs, it was even more essential to have accurate and timely spending trends and projections. New cash-flow models and financial statement modifications were made so that management and our board’s Finance Committee could monitor our financial position quickly and accurately. We continued to maintain the highest level of oversight and organizational practices as evidence by a clean audit that required less time than anticipated to complete.

Table 4: 2016–17 Finance: Plan vs. Projection

	2016–17 Initial Plan	Stage-gate Plan	2016–17 Projection [1]	Variance projection vs. Stage-gate Plan
Revenue	\$2,421K [2]	\$1,403K	\$1,967K [3]	+40.2%
Expenses	\$2,246K	\$1,980K	\$1,846K	-6.8%

Notes:

[1] Projections made based on actuals through *April 30, 2017*.

[2] Total revenue included \$454K carried forward from FY 2015–16.

[3] Includes projected revenue from Wikimedia, and full recognition of Simons Foundation grant.

Staffing

We initially didn’t plan any staffing changes in fiscal year 2016–17. However, based on our revenue projections, we decided early on to reduce staff size by two. In July 2016, Development Associate Victoria Hinshaw and Executive Assistant Renée LeVesque left the organization. When Communications Manager Eryk Salvaggio left the organization, we decided not to re-fill this position. Instead, we moved Ryan McGrady from a half-time to a full-time position and put him in charge of our internal communications. We outsourced our media work to PRCO, a local communications firm. After Director of Development Tom Porter accepted a job offer from a local non-profit and left Wiki Ed end of February, we hired TJ Bliss as new Director of Development and Strategy in early April.

At the end of 2016–17, we shifted Adam Hyland into a blog and data science role to meet those organizational needs, and hired Shalor Toncray as the Wikipedia Content Expert for the Humanities.

Table 5: 2016–17 Staffing: Plan vs. Projection

	2016–17 Plan	2016–17 Actual	Variance from Plan
Staffing	14 FTE	12 FTE	-14%

Looking ahead: the 2017–18 Plan

Overview

During next fiscal year, we're going to focus on two major goals: launching a *Future of Facts* campaign and building capacity to support a growing number of instructors.

The *Future of Facts* campaign is driven by our firm conviction that an informed citizenry does not emerge by itself. It needs efforts to empower the next generation of Americans so they can participate fully as citizens in the new century. At this very moment, students across the U.S. are exposed to a flurry of “fake news.” We need students who are able to distinguish an ad campaign launched by a lobbying group from reliable and trustworthy facts. Yet, a recent report published by researchers at Stanford Graduate School of Education shows a dismaying inability by students to distinguish credible sources from unreliable ones.³ Just because students can intuitively figure out a new app on their iPhones does not mean they can determine whether to trust something they read on the internet.

In addition to students being too trusting when it comes to online information, topic areas that are essential for an informed citizenry are largely underdeveloped on the English Wikipedia. There's a common misconception that quality on the world's most popular source of information improves by itself over time. However, that's only true for areas that Wikipedia's longtime editors care most about. Because these editors are volunteers, they tend to improve coverage of topics they're interested in. And because Wikipedia's editor base is overwhelmingly young and male, the articles of the highest quality are those in areas like video gaming, sports, TV shows, and military history. Content on topics that are key for informed citizens lags behind, both in coverage and depth. But people are looking online for information in politically relevant subject areas, and Wikipedia is most often their first choice.

Wiki Ed is in the unique position to transform media literacy education in the age of fake news while expanding the public's access to reliable and trustworthy information in areas that are relevant to an informed citizenry. We conducted our own research in 2016–17

³ Stanford History Education Group, *Evaluating Information: The Cornerstone of Civic Online Reasoning*, November 21, 2016

<https://sheg.stanford.edu/upload/V3LessonPlans/Executive%20Summary%2011.21.16.pdf>

that found 96% of instructors in our Classroom Program value Wikipedia assignments more than traditional assignments for developing digital literacy. 85% found Wikipedia assignments more valuable for learning about the reliability of online sources. At the same time, we've demonstrated over the past couple of years how first-time Wikipedia student editors can significantly improve the English Wikipedia's quality in underdeveloped topic areas. Next fiscal year, we will boost college students' digital literacy skills while helping the general public in the U.S. assess accurate information to discern fact from fiction.

In order to be able to support a fast-growing number of instructors in our Classroom Program, we will develop new features for our Dashboard software that will make our programs staff more effective. First, we will create a ticketing system to better track our responses to requests, which will enable us to streamline our support and provide better help to more program participants. We also plan to implement a *Guided Editing* system that will use artificial intelligence to review students' edits as they make them, making suggestions to avoid plagiarism, citation issues, tone problems, and manual of style errors, before the students' edit is made on the live article namespace on Wikipedia. Creating this *Guided Editing* system will enable us to address many of the most common challenges student editors face while keeping our staff at about the current size.

Key Initiatives in 2017–18

Future of Facts campaign

In the first quarter of next fiscal year, Wiki Ed will kick off a multi-year *Future of Facts* campaign. We will dedicate distinct resources to recruiting, onboarding, and supporting higher education courses in subject areas that are relevant for an informed citizenry like public policy, political science, law, history, sociology, and environmental science, as well as interdisciplinary courses that will work on these topic areas. Students in these courses will write Wikipedia articles in these topic areas, citing reliable sources, thereby improving the public's access to information on topic areas relevant to an informed citizenry. We will also recruit and support Visiting Scholar positions in these subject areas, in which we pair an experienced Wikipedia editor who writes in politically relevant topic areas with a university who provides access to sources in that subject.

We will use Wikipedia's unique nature as an open and collaborative system to teach college students the specific implications such an open system brings about with regard to

the construction of knowledge. Students will learn that Wikipedia is built by consensus, requiring contributors to use specific methods of dispute resolution and open dialogue to agree on the best way to present facts. They will learn how the Wikipedia editing community has spent the last 16 years refining its definition of whether an information source can be trusted or not. Students will reflect on why certain sources are more valid than others. Instead of providing students with a list of dos and don'ts, we will empower them to determine whether they can trust a source on their own. By contrasting Wikipedia's strict rules of sourcing with the ease of spreading misinformation through social media, we will encourage them to think about how what they learned from Wikipedia will affect their own behavior when consuming online information.

We'll also experiment with a new partnership model, where we empower subject matter experts affiliated with academic associations to edit the English Wikipedia in politically relevant topic areas. We know our programs increase the availability of reliable information on Wikipedia, and our student learning outcomes research last year has quantified the impact our Classroom Program can have on the digital literacy skills of students enrolled in the program.

Improvement of our Dashboard software

As we scale our programs, however, it's important to also ensure the additional students we bring into the program are properly supported on Wikipedia. Given we find sufficient funding, we will continue to invest in the technical support system we've created for our program participants, the Dashboard software. We believe the next big project, the Guided Editing system, is crucially important to scaling our programs more. We are seeking funding for that project this year; once we secure funding, we will begin that project. Until we secure this funding, we will use our in-house capacity to do maintenance work and minor feature development.

Activities, Goals, and Targets

Core Programs

Goal: Recruit new program participants, with an emphasis on sustaining our science impact and increasing our impact in topic areas relevant to the Future of Facts campaign

We expect to spend the fall 2017 term laying the groundwork for *Future of Facts* outreach in spring 2018. In the fall, we will enhance our outreach communications and strategy and lay the groundwork for a successful *Future of Facts* outreach campaign. We will activate partners to recruit their members and publish stories about our projects. To increase the number of courses in the fall 2018 term, we'll spend spring 2018 recruiting new leads and cultivating the best possible instructors to reach our impact targets.

Activities include:

- 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 with partners and in *Future of Facts*-related disciplines
- Onboard new Classroom Program instructors
- Outreach to Visiting Scholar sponsors at academic associations and universities
- Social media outreach
- Target outreach activities at historically black colleges and universities (HBCUs).
By bringing students explicitly studying topics related to African-American culture and history, we can improve Wikipedia's coverage of these topics. This ties in to our efforts to have citizens who understand American history, culture, and topics often overlooked in primary education.
 - Explore campus visit opportunities and other collaborations with program participants at HBCUs
 - Work with Wikimedia community leaders to develop training materials for students
 - Focus on topic areas rather than diversity of contributors

Goal: Explore engagement opportunities with campuses to build a foundation for long-term programmatic growth

We know how to succeed at recruiting new instructors through academic conferences. In Fiscal Year 2017–18, we'll explore growth opportunities that require staff time but no money in our budget. We have a lot of interest from program participants who would like to help the Classroom Program grow, and we'll cultivate those relationships to capitalize on the word-of-mouth recruitment and far-reaching contacts they have on campus.

Activities include:

- Host webinars for university departments, libraries, and centers to recruit new program participants.
- Cultivate Faculty Learning Communities at two campuses.
- Travel to present about Wikipedia and Wiki Ed on campuses when they are willing to cover the cost.
- Publish papers, blogs, essays, etc. in partner publications and other media.

Goal: Conduct communications and process audit to ensure efficient use of staff resources

We have developed processes for engaging potential program participants, and we've learned best practices for engaging instructors. As we shift our focus on quality contributions from courses and their students, we'd like to reframe our outreach messaging to find highly relevant courses and students to bring to Wikipedia. Activities include:

- Streamline messaging
- Update emails in Salesforce and documentation of when to send each one
- Onboarding pipeline reflection of spring 2017: what common threads do we see with new classes that didn't end up doing anything; what common threads do we see with new classes that had incidents?

Goal: Mentor global Wikimedia education leaders

The global education community looks to the Wiki Education Foundation for guidance and expertise, as we've expanded our programs and impact more than any other initiative thus far. In past years, we've supported their efforts tangentially by developing open-source tools and materials. Now that we're looking for more support from the Wikimedia

Foundation, we need to integrate back into the wider Wikipedia community. Mentoring and offering leadership in the global education initiative is one way to preserve our relationship with the community. Activities include:

- Participate in Wikipedia Education Collaborative
- Offer guidance and staff support in forming an Education User Group
- Present at Wikimania 2017

Goal: Explore new kind of expert engagement for program participants and members of partner organizations

After years of partnering with academic institutions and attending their conferences, we've seen opportunities to engage experts on Wikipedia when they don't fit in with our existing programs. We will explore how we can connect our far-reaching efforts with experts who can improve Wikipedia beyond the classroom. Activities include:

- Expert engagement via content gap analysis
- Sponsoring and offering resource access to Visiting Scholars

Goal: Determine data-driven approach to instructor retention

Increasing our retention rate of existing faculty is important for our long-term success. Next year, we will create a retention model that is based on current data and trends, is more reliably predictive, and can be used and updated term over term. Our current model is crude and is not sustainable long-term. If we are to better understand retention and base funding around retention predictions, we need to come up with a better retention model. Activities include:

- Determine the typical life cycle of an instructor in our program
- Identify impediments to retention
- Determine whether current retention efforts are effective
- Identify retention trends among instructors who teach in Future of Facts-related courses

Goal: Engage instructors to strengthen relationship with Wiki Ed

Continuing our efforts from FY 2016–2017, we should provide instructors with multiple ways to engage with Wiki Ed. Providing opportunities for instructors to engage outside of a Wikipedia assignment can help deepen the relationship Wiki Ed has with its instructors and will hopefully impact retention and outreach positively. Activities include:

- Involve instructors in conferences, workshops, and other outreach efforts
- Ask instructors to write guest posts for Wiki Ed’s blog
- Engage in monthly office hours to answer instructor questions
- Create a Wikipedia assignment or module text in the Dashboard specifically around the Future of Facts campaign
- Adapt Dashboard text resources to meet the needs of more program participants

Goal: Expand existing Visiting Scholars program

A consistent challenge in the Visiting Scholars program is evaluating impact and setting appropriate impact goals; while the focus of the program is quality rather than quantity, the specific way we’re able to affect quality is by empowering editors to use the best possible citations in the articles they improve. Different scholars work on different areas, and thus we want to be able to expand the program while better assessing the impact our facilitation of resources has had on the Scholar. For example, access to better citations means some editors are able to create or edit more articles, some more effectively take their articles to Good Article or Featured Article status, some create better lists, and others use the sources to provide review and critique of other people’s work. As we look to expand the program, we need to recognize quality takes many forms, and the program needs to be flexible enough to adapt to these needs. Activities include:

- Place additional scholars in topic areas relevant to the Future of Facts campaign
- Re-organize Visiting Scholars into a cohort on a set timeline, which will enable the program manager to more effectively establish deadlines and monitor success
- Encourage scholars to write a blog post for us between the middle and end of their term, going over some of their work and, importantly, explaining the ways the position improved their editing
- Survey scholars in the beginning and end of the term asking questions about access to sources, how access to sources has affected their editing, the quality of sources they use, their enthusiasm for the subject, and other editing habits;

compare the beginning/end in order to demonstrate the varied impact the program has on its participants

- Create Visiting Scholars profiles on wiki, regularly updating their contributions (e.g. how they're contributing to the Future of Facts, impact on Wikipedia), adding praise to the Scholars' work, and attracting more attention to the project and host alike
- Pilot the use of honoraria to create additional motivation for Scholars

Goal: Pilot alternative Visiting Scholars model with academic associations

We've seen that academic associations/organizations have enthusiasm for getting their members to edit Wikipedia. This pilot program will harness that enthusiasm and the subject expertise their memberships bring, providing training and guidance to new or inexperienced Wikipedia editors in order to have them improve Wikipedia's coverage of topics in their field. Two associations have participated in this sort of program already: Cochrane and the Association for Women in Mathematics. Neither of these fit within the traditional Visiting Scholars model, which is based on forming connections between experienced Wikipedians and libraries at educational institutions. Whereas a fundamental part of the original model is Wikipedians' access to library resources, in this alternative model we'll try to get sources for those who need them but in general members of academic associations will already have access. This program is a great way for academic associations to improve Wikipedia's coverage of their field.

- Recruit 3 academic associations based on their compatibility with the Future of Facts campaign
- Evaluate the impact of this model to determine whether it's a viable program and/or the extent to which it has the opportunity to grow

Program Support

Goal: Support continued program growth

We expect our programs to continue growing and diversifying in 2017–2018, and we expect many tech needs to emerge both in connection to the *Future of Facts* campaign and to enable program growth in general. Most of our current capacity will be focused on maintaining the Dashboard and supporting program growth and program research as

specific needs arise. We will also continue mentoring new open-source developers through structured programs like Outreachy and Google Summer of Code. We have a considerable backlog of core improvements to the Dashboard experience for instructors and students that we want to carry out, especially in support of a) students' iterative article development, and b) instructors' evaluation of student work. However, our main limitation will be software development capacity, and which is a long-term need. While Wiki Ed's early tech projects relied on contract development with the agency WINTR, we've developed enough in-house expertise to begin building out our in-house, permanent tech capacity if additional resources become available. Activities include:

- Keep the Dashboard up and running smoothly as usage continues to expand
- Mentor for Google Summer of Code and Outreachy internships
- Update and improve Survey system and email capabilities for the requirements of continued student survey research
- Develop additional Dashboard features as time permits

Goal: Develop ticketing system to track program participants' requests for help

At present, we lack systems to respond efficiently and transparently to student and instructor questions. For example, if a question comes to Classroom Program Manager that needs to be answered by a Content Expert or the Digital Services Product Manager, she needs to forward it to them. This creates a number of inefficiencies: the Classroom Program Manager must serve as a gatekeeper for these requests; selection of the "right" person to reply depends on Classroom Program Manager picking the right person; our ability to track responses is manual and error-prone. We also have no way to collect data on what we are doing, which makes it more difficult to figure out what sorts of responses work best. We plan to create a ticketing system to better track our responses to requests, which will help us streamline our support and provide better support to more program participants. Activities include:

- Implement and integrate a ticket system for contacting and helping program participants

Goal: Establish brand identity separate from the Wikimedia Foundation

A continuing problem we have when trying to engage with outside entities like funders or journalists is brand confusion with the Wikimedia Foundation. Thus, a key facet of our

plan for next year will be to determine how to establish a brand identity separate from WMF's. As part of this work, we also want to more clearly explain what Wiki Ed's role is in our classroom program, which also remains a point of confusion. Activities include:

- Drop “Foundation” from the name among website, standard letters, and generic slide deck presentations
- Determine the best solution for the Wiki Ed/Wiki Edu/WEF confusion
- Evaluate whether a complete rebrand is necessary
- Create an infographic explaining what Wiki Ed does to support classes

Goal: Develop and enact communications campaign in support of Future of Facts campaign

Communications will play a key role in both the fundraising and outreach work of the *Future of Facts* campaign. This involves ongoing media work, pitch letter development, handout creation, and speaking opportunities to position Wiki Ed senior staff as experts in the topic area. Activities include:

- Create pitch letters, grant proposals, slide decks, and handouts for fundraising
- Create handouts and other needs for outreach work for *Future of Facts*
- Pitch Wiki Ed storylines to relevant news media to position Wiki Ed as leaders in the truth and accuracy space
- Create speaking opportunities for senior leadership staff

Goal: Provide good ongoing support for programmatic initiatives

Communications also plays a large role in supporting existing programs, including the Visiting Scholars and Classroom Programs, and will help develop materials for the alternative Visiting Scholars program (including coming up with a better name).

- 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.
- Continue monthly 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.
- Create new training modules, develop new assignment types, and modify existing assignment and training content as needed.
- Publish regular blog posts about Wiki Ed's work, sharing our impact, learnings, travel, and stories.
- Assist in streamlining existing templated messages in Salesforce and the new ticketing system, as appropriate.
- Create and distribute a postcard that can be used in place of brochures at conference booths.

Goal: Provide high-quality support from Wikipedia Content Experts

Ensuring program participants have good access to support and that any problematic student edits are addressed rapidly is an important part of the Wikipedia Content Expert role. Activities include:

- React to student questions
- Proactively review student drafts in sandboxes
- Address any incidents on Wikipedia quickly
- Review all student work after the end of the term
- Evaluate the impact of content expert support on student article quality

Goal: Begin developing Guided Editing functionality for automated student help

One of the biggest pain points about our student editors for existing Wikipedia editors is that sometimes they struggle to get the tone right for an encyclopedia article. Issues with plagiarism, too few citations, and failure to meet the manual of style on Wikipedia also frustrate existing editors. We want to create a *Guided Editing* experience that uses artificial intelligence to review students' edits as they make them, making suggestions to avoid plagiarism, citation issues, tone problems, and manual of style errors, before the students' edit is made on the live article namespace on Wikipedia. Creating this *Guided Editing* system will enable us to address many of the most common challenges student editors face. In 2017–18, we will begin the early stages of what we expect to be a major technical project.

Research and Academic Engagement

Goal: Continue Student Learning Outcomes Research

In Fall 2016, we started investigating Student Learning Outcomes (SLO) with Wikipedia-based assignments. This research acts as an example, model, and framework for future research, but it is far from complete and requires more time and effort to continue. This study will benefit researchers and students by narrowing the focus of previous research and increasing the amount of data on this underrepresented subject. More data on this subject will allow a better understanding of the student's contexts that affect attitudes, productivity, digital literacy, collaboration, and skills transfer. This information is beneficial to Wikipedia and Wikipedia researchers because it helps triangulate attitudes and contexts for understanding how students engage Wikipedia, but it also helps create knowledge about increasing student learning while collaborating on and creating Wikipedia articles. In the end this research will help improve Wikipedia (and the world) because it will help to improve teaching and learning using Wikipedia, particularly in regard to creating ideal contexts for new editors. Activities include:

- Design survey for both repeated and term-specific research questions
- Continue data collection and analysis
- Publish data in open format
- Present data and findings at national and international conferences
- Publish analysis and presentations in open venues

Impact Targets

Our work will all feed into the following annual impact targets, with baseline numbers from 2016–17:

- Number of students participating in the Classroom Program: 15,000 (up from baseline of 13,500)
- Number of Wikipedia articles improved: 14,000 (up from baseline of 12,600)
- Number of words added to articles: 10.5 million (up from baseline of 9.2 million)
- Number of blog posts telling the story of Visiting Scholars impact: 20

Other targets:

- Launch of a ticketing system (December 2017)
- Creation of infographic explaining how Wiki Ed affects change (August 2017)

- Produce discipline specific handouts on four additional topic areas (one per quarter)
- Publish 15 guest blog posts from instructors (up from baseline of 12)
- Feature of Wiki Ed in at least 50 external media articles (up from baseline of 40)
- Publish additional data about student learning outcomes

Strategic planning for 2017–2020

In 2015, we developed our first two-year strategic plan which set the direction for our organization until 2017. At the beginning of next fiscal year⁴, we will embark on a strategic planning process that will cover the time between July 2017 and June 2020. 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 Q1 and culminate in a board retreat in Q2 that will create alignment around the direction for the future.

Revenue, Expenses, and Staffing

Revenue

During fiscal year 2016–17 it became clear to us that we needed to explore additional funding streams in order to set our organization up for a financially sustainable future. That’s why, starting in December 2016, Executive Director Frank Schulenburg and the board had several conversations about which new sources of income might be available to us in the future. One major decision made in early 2017 was to apply for funding through the Wikimedia Foundation’s Annual Plan Grants program. Since then, we’ve worked on intensifying our relationship with both the volunteers who act as advisors to the Wikimedia Foundation and with the grantmaking staff at the foundation itself. After meeting the eligibility criteria, we successfully submitted a “Simple Annual Plan Grant” of about \$99K, a number close to the maximum amount that is available through this line of Wikimedia grantmaking. In July 2017, we’re planning to enter the “FDC Annual Plan Grant” cycle, which will allow us to apply for grants larger than \$100K. The reasons for this major shift in how we think about the financial future of our organization are obvious: new student editors in our Classroom Program add huge amounts of high-

⁴ We had initially planned to launch the next round of strategic planning in Q3 of fiscal year 2016–17 and decided to postpone the process to fiscal year 2017–18.

quality content to Wikipedia, mostly in topic areas that are underdeveloped. And by bringing significant amounts of new women editors to Wikipedia, Wiki Ed is doing its share of countering systemic bias that Wikipedia suffers from to this day. A recent study conducted by researchers at Carnegie Mellon University and the University of Pittsburgh has proven that students who joined Wikipedia through Wiki Ed's programs edit more, improve the articles more, and stayed longer than did newcomers who joined Wikipedia individually.⁵ We think these results demonstrate the value of our programmatic activities very clearly and we are confident that both volunteers and Wikimedia staff will honor our efforts to significantly improve Wikipedia. Going forward, it will be more important than ever for Wiki Ed to actively participate in Wikimedia movement activities, maintaining a positive relationship with the Wikimedia Foundation and its affiliates, and providing ways for the Wikimedia community at large to give input on our work.

In general, we still expect institutional donors to be our main source of revenue in the near future. That's why we will focus most of our efforts next fiscal year on providing excellent stewardship to existing funders while building new relationships with foundations and corporations that are aligned with our mission.

Our new *Future of Facts* campaign will play a key role in attracting new donors. Although it is built on the success of our Year of Science in 2016, we started making some changes in how we plan and execute such a major initiative. Based on our learnings from the Year of Science, we have given ourselves significantly more time to prepare for the launch. Since Q3 of 2016–17, we've been working with a local communications firm on creating a communication package, targeting both individual and institutional prospects. We've also designed our new donor activation campaign as a multi-year initiative that will help shape donors' perception of our organization's unique value proposition.

The current social and political climate in the United States, sometimes called the “post-truth” era, is a prime context in which to leverage the innate value of editing Wikipedia in educational settings. There is a growing interest in philanthropy (particularly in the philanthropic sectors focused on democracy, citizen participation, and education,) to address what appears to be a troubling trend away from traditional understandings of fact vs. opinion. Many funders are sensing the need to support efforts that help people – especially students – understand and *engage in* the process by which factual, verified information comes to be presented as such in various media, particularly on the Internet.

⁵ Robert Kraut et al., *Production or commitment? Dilemmas in bringing newcomers on-board* (currently under review)

We will work to frame the work of Wiki Ed as a compelling partner capable of making real progress toward solving this major societal issue.

Given the enormous growth of our Classroom Program from 3,400 students in 2014 to projected 15,000 students in 2017, a second priority for us will be to find funding for tech projects that allow us to support a growing number of program participants without hiring additional staff. We have already identified a number of institutions and high-net worth individuals that have funded “educational tech” projects in the past and we expect to find sufficient funding for our software design and development work in the first half of next fiscal year.

All of this will not be sufficient in the long term. Our metrics show us a steep increase in growth from our visibility efforts (from 23 new instructors in spring 2016 through visibility work to 60 in spring 2017). That means that our controlled outreach efforts (mostly through outreach webinars, partnerships with academic associations, booths at conferences, and campus visits) aren’t the only ways new instructors join our classroom program in significant numbers anymore. Instead, we’re noticing that the results of last year’s public awareness work combined with word-of-mouth among faculty members to increase our momentum. If this trend continues, we’ll face a situation where we don’t have a mechanism in place that would allow us to grow our revenue while large swaths of university instructors in the United States and Canada embark on teaching with Wikipedia. That’s why we’re also going to begin exploring a fee-based model in which universities pay for certain additional services or software features. Early conversations with administrators and faculty from different institutions in higher education indicate that decision-makers in the university space might not be as opposed to paying for extra services as we initially thought.

With regards to board giving, our goal is to maintain 100%. In addition, and given the fact that our board has played an important role in helping us with identification, cultivation, solicitation, and stewardship of donors and prospects, we will continue working closely with the development committee.

Our development targets for 2017–18 are:

- Successfully complete a FDC Annual Plan Grant application
- Increase awareness of our organization and its positive impact among individual and institutional prospects, leading to a minimum of \$500K in support of our *Future of Facts* campaign

- Maintain a positive relationship with our existing funders, resulting in at least one renewal of an existing multi-year grant at an increased funding level
- Add at least two new institutional funders at a level of \$100K or above to our revenue stream
- Generate a minimum of \$750K support for tech projects that will enable us to keep pace with a growing number of instructors who use Wikipedia as a teaching tool
- Explore a fee-based model for additional services or software features
- Maintain 100% board giving

Table 6: Revenue Projection for 2017–18

	Q1	Q2	Q3	Q4
Revenue total	\$350K	\$770K	\$1,458K	\$160K
<i>Foundations</i>	\$200K	–	\$1,458K	\$150K
<i>Corporate</i>	\$50K	–	–	–
<i>Individual</i>	\$100K	\$760K	–	\$10K
<i>Board giving</i>	–	\$10K	–	–

Expenses

2017–18 will continue to build on increasing the awareness of Wiki Education Foundation. Unlike prior years, we only included basic operational or fully funded expenditures. For 2017–18, we created a conservative budget with the goal of not having to implement an internal stage-gate. However, we will continue to monitor expected revenue and will implement a stage-gate if needed. Any implementation of a stage-gate plan will be presented to the Finance Committee as necessary. Our plan is to only add new expenditures as funding for those expenses are secured.

Table 7: 2017–18 Plan revenue and expenses

	2017–18 Plan
Revenue	\$2,738K
Expenses:	\$2,428K
General and Administrative	\$325K
Governance	\$95K
Fundraising	\$283K
Programs	\$642K
Programs Support	\$932K
Program Research and Academic Engagement	\$151K

Staffing

Increased interest in our programs has led to the situation that our staff can barely keep up with supporting a fast growing number of instructors that use Wikipedia as a teaching tool in their classes. In order to keep the number of staff at the current size, we'll be working on technical solutions that will enable our existing staff to be more efficient.

If funding for our new *Guided Editing* feature becomes available, we will put together a temporary team of software developers and designers that will build this new feature beginning in early 2018 (not included below).

Figure 3: Staffing by functional area (headcount)

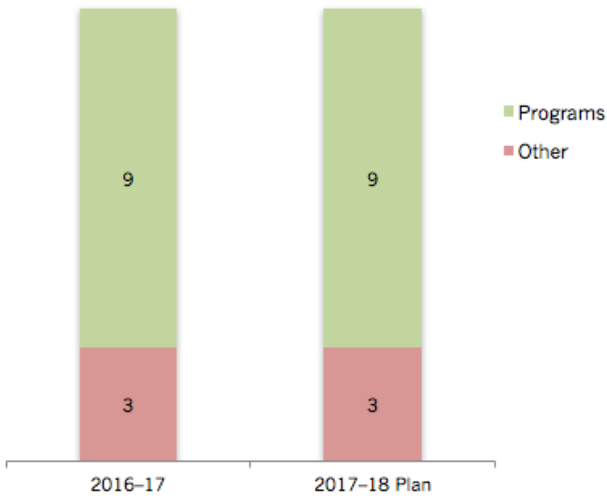
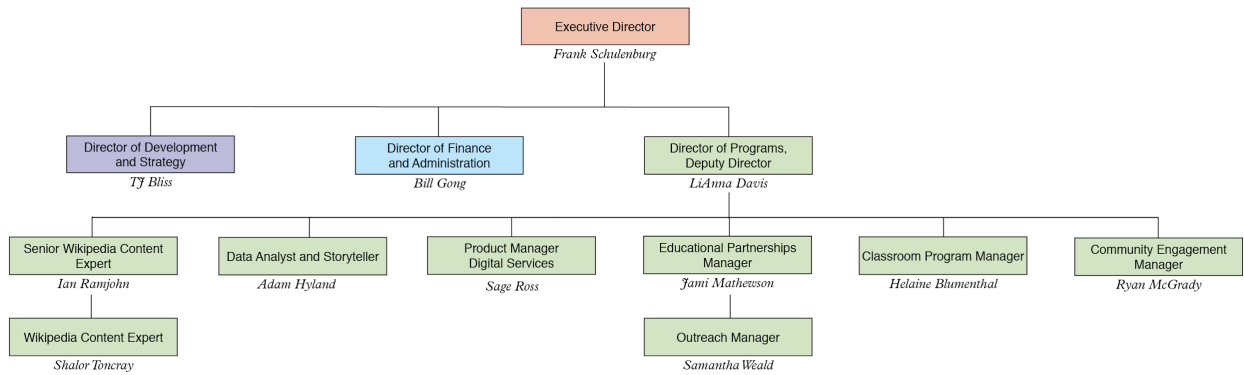


Figure 4: Organizational chart FY 2017-18



Board Resolution

RESOLVED, that the Board of Trustees hereby approves management’s proposed 2017–18 annual plan, which includes \$2,738K of revenues, \$2,428K of spending. If, during the year, management anticipates the spending at each quarter-end will differ materially from the plan, the Board directs management to consult the Treasurer and the Chair of the Audit Committee promptly. Reference: Management’s currently anticipated quarterly breakdown of this approved annual plan.

Table 8: Quarterly breakdown of the Annual Plan financials 2017–18

2017–18 Plan	Q1 (Jul.–Sep.)	Q2 (Oct.–Dec.)	Q3 (Jan.–Mar.)	Q4 (Apr.–Jun.)	Total
Operating Cash [1]	420,502 [2]	232,745	469,634	1,242,150 [4]	
Cash Revenues [3]	350,000	770,000	1,458,000	160,000	2,738,000
Cash Spending	537,757	533,111	685,484	671,448	2,427,800

Notes:

- [1] As of the beginning of the quarter.
- [2] Operating cash available at the beginning of the year (July 1) is based on projected expenditures and expected unspent funds carried forward from FY 2016–17.
- [3] Anticipated/projected revenue.
- [4] Anticipated cash of \$720K to be available at the start of fiscal year 2018–19.

* * *

Appendix

Risks considered in developing the 2017–18 plan

1. We don't hit our fundraising targets

Meaningful financial support through the Wikimedia Foundation will be available in early 2018. That's why we'll be still under substantial pressure during the first two quarters of fiscal year 2017–18 when it comes to obtaining funding commitments.

In order to mitigate that risk, we decided to only expand capacity once the necessary funds come in. With *Future of Facts* and *Guided Editing*, we have also developed two highly attractive packages that resonated well with early prospects. Finally, we have hired a very capable and extremely well connected new Development Director who started engaging with prospects in fiscal year 2016–17.

While we are confident to receive funding as projected, we will have to closely monitor our revenue stream and cashflow, stay in close contact with our board's financial and audit committee, and make course corrections if needed.

2. Substantial and uncontrolled growth in demand

In 2016–17, we had worked hard on increasing our organization's visibility among instructors and the general public. As a result, we've been noticing a steep increase in instructors who join our Classroom Program through other channels than controlled outreach.

We are confident that the work we're doing to be able to expand our capacity, as well as a reduction in our proactive outreach work, has set us up to be able to still manage the number of classes coming in this fiscal year. However, there's still a risk that our tech work won't be sufficient to address the growth.