Wiki Education

2021–22 Annual Plan

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Looking back: 2020–21

A Year in Review

When we were in the process of creating last fiscal year's annual plan, the COVID-19 pandemic had just started to tighten its grip on our planet. In the United States, many millions of people had already lost their jobs, the Dow Jones had dropped dramatically, and large parts of our country were in lockdown. Wiki Education, like other nonprofits at that time, faced a high level of uncertainty, both with regard to its immediate financial future as well as to the effects of the pandemic on its programs.

Today, we're proud to report that Wiki Education not only weathered the storm, but emerged stronger and more resilient from the crisis than many others. It's certainly not an exaggeration to say that our organization has been extremely successful in mastering one of the biggest challenges nonprofits faced in the early 21st century.

While other players in our environment dropped their annual targets and switched into bare survival mode, staff at Wiki Education worked hard in order to maintain as much of the impact our organization has on Wikimedia projects, program leaders in the Wikimedia universe, and on the many millions of readers it serves. Not only were we successful in supporting an impressively large number of courses in our Student Program, we even grew the number of subject-matter experts Wiki Education brings to Wikipedia and Wikidata through our Scholars & Scientists Program.

Despite the disruption to higher education caused by the pandemic, our Wikipedia Student Program produced great content on important topics. Our outreach efforts of past years, particularly in our Communicating Science and equity initiatives, led to strong showings in both content areas. Nearly 7,000 student editors added more than 5.5 million words to more than 7,000 science-related Wikipedia articles this year as part of our

"By adding scholarly information to Wikipedia, 7+ billion people will have access to reliable information as opposed to fake news, pseudoscience, and conspiracy theories."

— Scholars & Scientists participant Magdalena Luca, Ph.D., Professor of Mathematics and Statistics, MCPHS University

Communicating Science initiative. And students also added nearly 1 million words of content to equity-related articles on English Wikipedia, across a variety of topics, including several new articles. One example is the article on the Code of Indian Offenses, U.S. legislation that restricted Native American's cultural and religious practices — an article that didn't exist until students in our program created it. Motivated by the pandemic, student editors also improved several COVID-19-related articles.

We also tackled English Wikipedia's COVID-19 coverage in our Scholars & Scientists Program. Thanks to the generous sponsorships provided by one of our funders, we used our existing academic network to improve Wikipedia's coverage of state and regional responses to the COVID-19 pandemic through a series of courses that ran between April 2020 and February 2021. As a result, Wikipedia's quality in this specific content area has improved substantially, providing millions of readers with accurate and trustworthy information. Our course participants edited 256 articles (including 20 new articles), which have been read more than 17 million times since the start of the pandemic (as of March 2021). To our knowledge, this initiative was the first effort ever to engage subject-matter experts during a national emergency to systematically improve Wikipedia's coverage of a topic crucial to the general public.[1]

"On Wikipedia you have the opportunity to bring an expert's perspective to something that might not have been treated expertly. Everyone who finds Wikipedia to be a good resource ought to contribute in one way or another, to the ongoing value of Wikipedia. One way of doing that, of course, is to act as an editor."
– Scholars & Scientists Participant Bill Phillips, past winner of the Nobel Prize in Physics
Image Credit: Markus Pössel (User name: Mapos), CC BY-SA 3.0, via Wikimedia Commons

Wikipedia's coverage of physics topics also got a boost last year thanks to a partnership with the American Physical Society. In a series of three courses in our Scholars & Scientists Program, physicists improved Wikipedia's coverage of physics topics and biographies of women and other underrepresented people in physics. Through this course, we also taught a Nobel Laureate — Dr. Bill Phillips, who won the prize in 1997 — how to edit Wikipedia, which he reflected on in a

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[1] A thorough evaluation report is available on the Wikimedia Foundation's Meta Wiki: https://meta.wikimedia.org/wiki/Wiki_Education_Foundation/COVID-19_Project_Evaluation

[blog post](#) that was [reprinted in the Signpost,](#) the English Wikipedia's newspaper.

Another highlight of last fiscal year is the performance improvement of our global Programs & Events Dashboard. This software has been enabling thousands of Wikimedia program leaders from all over the world to track the results of their programmatic activities. When the continuously increasing amount of usage brought our software to its limits, we worked with an external performance consultant on migrating the software to a distributed system. As a result of this work, the Programs & Events Dashboard is now running on a coordinated set of servers that can easily be scaled up to handle higher loads. This important step will allow even more Wikimedia program leaders around the world to measure the impact of their initiative for years to come. Maintenance and improvement of this critical piece of infrastructure is one of Wiki Education's key contributions to the global Wikimedia Movement.

Our staff — pictured here in our Zoom All Staff in July — played a big role in our success this year

Our success in all of this has been rooted in our ability to navigate a high level of uncertainty and in our uncompromising willingness to adapt to the challenges we faced at the onset of the pandemic. Staff has stepped up in a way that no one could ever have imagined a year ago — in particular given the cuts we had to make in June 2020. Wiki

Education's board has played a key role in this process by providing our ED with an exceptional level of flexibility based on trust developed over years. With the support of some of its long-term funders, Wiki Education was able to emerge from this global crisis strong and healthy, and we're all tremendously grateful for everyone who played a role in this success story.

Programs

Wikipedia Student Program

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

Despite the ongoing pandemic, the Student Program continued largely uninterrupted. In Fall 2020, we supported a total of 322 courses, and we're currently supporting 342 in Spring 2021. Even in the face of reduced staff capacity, we were able to onboard a large number of courses and provide them with quality and timely support. To help with reduced staff capacity, we asked a number of instructors in Fall 2020 to keep work in sandboxes to be reviewed by us at a later date. We learned that this strategy was ineffective for both us and our faculty and students and we will not be pursuing it in future terms. We continued to roll out features to help instructors and students navigate their Wikipedia project, including more automated guidance from the Dashboard as well as a series of emails sent to instructors throughout the term to help them with major parts of their Wikipedia assignments. Additionally, we continued to run a small mentorship program in which new faculty are matched with returning faculty in the Wikipedia Student Program. In Fall 2020, 18 new faculty were matched with existing faculty, and in Spring 2021, 32 were matched. The first results were promising and we will continue to evaluate this program in the coming terms.

Goal: Implement equity recommendations

In Fall 2020, we implemented a variety of updates to our recommended course timeline to encourage students and faculty to engage with issues concerning knowledge equity on Wikipedia. We've ensured that all of the major components of the Wikipedia assignment include tasks related to equity. Based on results from the Fall 2020 instructor survey, roughly 93% of instructors felt that Wiki Education's materials and resources helped their students think about and tackle issues related to equity. We're asking more pointed questions about this in the Spring 2021 instructor survey.

Wiki Scholars & Scientists Program

Wiki Education's Scholars & Scientists courses were on Zoom even pre-pandemic.

Goal: Increase the impact of current synchronous course offerings

We successfully expanded our synchronous offerings for our Wikipedia and Wikidata courses. We ran twenty Wikipedia-focused courses and seven Wikidata-focused courses. We attribute this success to condensing our course curriculum from twelve to six weeks for Wikipedia and from six weeks to three weeks for Wikidata. This shift allowed for easier scheduling for course participants and for more courses overall, as shorter courses allow for more openings. We also acknowledge that as more people learn about Wikidata, presentations and workshops have been effective venues for generating new leads and participants.

Goal: Explore self-directed Wikidata courses

The COVID-19 pandemic forced us to be flexible in 2020. Due to more consistent demand for virtual courses, we prioritized a Wikipedia guest instructor pilot program over the self-directed Wikidata course. We devoted our staff time to the development of a guest instructor manual, piloting a guest instructor-led course, and a review of that material by the guest instructor. Although we are still eager to build out a Wikidata self-guided course, it is our intention that creating a guest instructor program will allow more immediate flexibility moving forward into fiscal year 2021–22.

Wikipedia Expert Support

Goal: Provide support for Wikipedia and Wikidata programs

Despite the reduction in staff, we were able to support more than 83% of the courses we supported in the previous fiscal year. Student numbers in Fall 2020 were 90% those in Fall 2019. We were fortunate that members of the Wikipedia community were willing to provide assistance, notify us of problems, and were understanding of our reduced means. Colleagues throughout the organization were also willing to provide assistance at busy times. This year reinforced the importance of our strong relationship with the Wikipedia community. Our ongoing responsiveness to community concerns has built us a reservoir of goodwill that allowed us to continue to function well despite the reduction in staff capacity.

Program development

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

Due to the ongoing pandemic, we did not have the staff capacity to pursue funding for this project this year; we hope to in the near future.

Targets

The Programs team's staff accomplished an incredible amount this year, balancing the needs of program participants and adopting creative processes to support more participants than ever before. The hard work is reflected in our targets, where we significantly overperformed our goals in all areas.

Table 1. Targets for Programs in fiscal year 2020–21: goals and projected actuals.

Description	Goal	Projected actual	Notes
Program participants	9,000	14,000	While we significantly exceeded our goal, we had fewer participants than expected in the Student Program in Spring 2021, despite onboarding a larger number of classes. We attribute

			this to ongoing instability in higher education from the pandemic.
Wikipedia articles edited	8,000	14,000	
Content added to Wikipedia	6 million words	9.4 million words	Similarly, while we exceeded our goal, our Spring 2021 Student Program term produced about 15% less content than the Fall 2020 term, even though we had more courses participating. We attribute this to ongoing instability in higher education from the pandemic.

Technology

Goal: Support Wiki Education staff and programs

Highlights from this year include a bevy of Dashboard improvements focused on improving the efficiency of the Wikipedia Student Program, along with new analytics features for Wikidata and new email infrastructure for marketing the Scholars & Scientists program. We added a suite of automated instructor advice emails for each stage of a Wikipedia assignment, implemented frequently-requested features to automate peer review matching and let instructors see the students' assignment interface, and overhauled the templates used to guide students' article evaluations and peer reviews. We also launched a new in-Dashboard FAQ system to replace the aging ask.wikiedu.org site, and made considerable strides in improving the performance, monitorabiity, and reliability of the Dashboard.

Goal: Adapt the Dashboard for self-paced courses

We did not move forward with developing our first self-paced course offering this year, so no Technology work for this project was completed beyond very preliminary need-finding.

Goal: Create a flexible checkout system for course sales

The main use we anticipated for an overhauled fully-automated checkout system was to sell self-paced courses. Only modest changes to the checkout system were required to support changes in the Scholars & Scientists sales process for live remote courses.

Goal (2019–20): Increase test coverage of our Javascript code

Having a robust and comprehensive suite of code tests lets us evolve and extend the Dashboard, without accidentally breaking it. While we have very solid tests for the Ruby code that runs on the Dashboard server, our testing of JavaScript code — which runs in a user's browser and generates the user interface — has been less comprehensive and less effective. For the previous year, we decided that we needed a new approach to testing and measuring our JavaScript code, rather than simply extending our previous approach by writing more tests. The foundation for that new approach was put in place in Summer 2020. Although we didn't include it in this year's annual plan, based on that work — which relies on interactive browser-based "feature" tests instead of code-centric "unit" tests — we significantly passed the previous year's goal.

Targets

Table 2. Targets for Technology in fiscal year 2020–21: goals and projected actuals.

Description	Goal	Projected actual	Notes
Uptime for wikiedu.org & dashboard.wikiedu.org	99.5%+	99.8%+ (estimated)	We had no significant unplanned downtime.
Provide timely support for the technical needs of the organization		Complete	
Support the successful launch of a Wikidata self-paced course		Plans shifted	
Deploy a checkout system for fixed-price course offerings		Plans shifted	

Increase test coverage for our JavaScript code (follow-up from 2019–2020)	50%	86%	Measuring coverage via browser tests provided an immediate boost in coverage and guided further testing.

Communications

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

We maintained an active blog throughout the year, averaging around 10 blog posts each month. Of particular interest was a series of posts reflecting on the 10-year anniversary of the start of the Wikipedia Student Program. In spring 2021, we brought on Evan Monk, an undergraduate at Vanderbilt University, as our marketing and communications intern. Evan wrote a series of blog posts featuring participants in our Scholars & Scientists Program and started a new Wikidata newsletter for us, both of which proved popular. Our communications work helped us maintain engagement with our community and supported the recruitment of Scholars & Scientists course participants.

Advancement

When we created the plan and budget for fiscal year 2020–21, we faced a high level of uncertainty. In late May 2020, as we submitted the final version of our new annual plan to the board, it was entirely unclear to what extent the COVID-19 pandemic would affect our ability to generate revenue through institutional grants, individual donations, and course fees. That's why we set conservative targets, taking into account that grant renewals could potentially come in at lower levels than expected or that our ability to sell Wikipedia and Wikidata courses could be harmed by the effects of the national emergency caused by the coronavirus. Today we know that both our grant revenue and our earned income exceeded our expectations (see tables 3 and 5 below). At the end of fiscal year 2020–21, we project a total revenue of $2,148K compared to a target of $1,242K, which also includes a Paycheck Protection Program (PPP) loan provided by the U.S. government.

The success of our efforts is even more remarkable given the fact that our fundraiser position was unfilled in Q1 and Q2 (with the ED and the Deputy Director filling in) and that

the earned revenue was generated by one full-time employee instead of two (as in the prior year). Part of this can be explained by a combination of taking a conservative approach in budgeting and extremely hard work in all areas of revenue generation. At the same time, we significantly reduced expenses and increased the efficiency of how we operate, e.g. through improvements in the sign-up, payment, and onboarding process for our Scholars & Scientists Program. In that sense, the effects of the pandemic have helped Wiki Education find a way to keep the impact of our programs on an almost pre-pandemic level while also using as few resources as possible.

Fundraising

Goal: Maintain a healthy relationship with existing donors.

When we created last year's annual plan, we identified existing funders backing out of their verbal funding commitments during the pandemic as one of the biggest risks for our organization. That's why maintaining healthy relationships with our existing donors was at the heart and center of our fundraising efforts in fiscal year 2020–21. As soon as we knew the extent of our staffing cuts in summer 2020, our ED walked all our long-term institutional and individual supporters through the expected changes in personal phone calls. We know from direct feedback during these calls how much our funders appreciated these heads-ups.

Also, in an effort to create more clarity about our impact during the pandemic, we provided select funders with additional reports (e.g. a report outlining Wiki Education's equity work or an evaluation report about our COVID-19 Wikipedia initiative).

All of these measures paid off. At the end of the year we're happy to report that the renewals from existing donors significantly exceeded our expectations. These results have given us enough of a runway to make some key hires in the area of revenue-generation and to work on expanding our prospect pipeline.

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

Having Advisory Board members join the organization while we didn't have a fundraiser on board (as the main person to interact with those Advisory Board members) didn't make much sense. That's why we postponed work in this area until mid April. At the point of the writing of this document, we have identified a number of highly suited candidates and

we're getting ready to recruit and onboard these prospects. We are still convinced that our new Advisory Board can play a key role in helping us connect with new institutional donors and we will increase our efforts in this area going forward.

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

While we have been successful as an organization in teaming up on specific projects with "blue chip" organizations, these efforts have mostly worked out in selling services rather than in fundraising. The same is true for our idea to collaborate on "content campaigns" with the Wikimedia Foundation. Our partnership with the Asian American Journalists Association (AAJA) through a cooperation with the communications department at the Wikimedia Foundation benefited our earned income stream rather than our fundraising efforts.

With regard to collaboratively brainstorming "cool projects" with funders, our COVID-19 initiative (which came to fruition through conversations of our ED with one of our long-term supporters) is a prime example of how successful this approach can be. The COVID-19 initiative has also shown the strength of having our ED devote more of his time to directly interacting with donors — based on the high level of trust developed over the years, the funds for this initiative came in quickly and without unnecessary bureaucratic hurdles.

Table 3. Fundraising revenue target vs. actuals for fiscal year 2020–21, breakdown by quarter

	Target	Actual	Difference
Q1	$334K	$335K	$1K
Q2	$0K	$295K	$295K
Q3	$658K	$1,000K	$342K
Q4	$0K	$0K [1]	$0K
Total	$992K	$1,630K	+$638K

Notes:

[1]   Projections made based on actuals through May 14, 2021.

Earned income

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

As of May 2021, we have supported 385 subject-matter experts in the Scholars & Scientists Program during this fiscal year, training them how to add to Wikipedia articles and Wikidata items related to their expertise. We recruited several of these participants through partner organizations, including 500 Women Scientists, the Global OER Graduate Network, the Smithsonian, the American Physical Society, the Association of Psychological Sciences, the Genetics Society of America, the University of California, Los Angeles Library System, the National Science Policy Network, and the Midwest Political Science Association.

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

This year, we made our Scholars & Scientists Program more cost-efficient by cutting expenses. We spent the summer of 2020 developing scalable systems and infrastructure for bringing on new program participants, including developing seamless payment options for customers. We not only reduced the overall cost of courses by cutting the training period in half, we also reduced the number of support staff during synchronized classes by half while maintaining positive reviews from participants. We spent the year improving our marketing capabilities by honing messaging, investing into a mass emailing software, starting a Wikidata newsletter, and facilitating word-of-mouth recommendations from both participants and partners. After a few years of market research and experience with prospective customers, we identified a price point that allows us to engage more customers while still covering the cost of the program.

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

When we developed this goal, we were unsure whether organizations would have the budget during the COVID-19 pandemic to sponsor Scholars & Scientists courses, giving our Scholars & Scientists team the time and capacity to develop a more scalable self-paced

Wikidata model. However, as we continued filling courses and our Program Manager's time, our team was unable to pursue this goal. Additionally, we learned that organizations and individuals were eager for virtual, collaborative experiences like our current Scholars & Scientists Program model. Thus, we placed this goal on hold.

Targets

Table 4. Non-revenue target vs. actuals for fiscal year 2020–21

Description	Goal	Projected actual	Notes
Recruit subject-matter experts for Scholars & Scientists courses	Run 12 6-week Scholars & Scientists courses	We ran 27 6-week Scholars & Scientists courses	We were able to more than double the number of courses, as our Wikidata courses have been more successful than we projected in May 2020.
Learnings from self-paced online course	Evaluate and document pilot program	Plans shifted	Since our target audience was eager for virtual, collaborative experiences during COVID, we did not begin this project.

Table 5. Earned income target vs. actuals for fiscal year 2020–21, breakdown by quarter

	Target	Actual	Difference
Q1	$37K	$57K	$20K
Q2	$37K	$47K	$10K

Q3	$137K [1]	$133K	($4K)
Q4	$37K	$40K [2]	$3K
Total	$248K	$277K	$39K

Notes:
[1]   This includes the $100K funding for our Smithsonian courses which were initially scheduled for the summer of 2020, but had to be postponed due to the pandemic.
[2]   Projections made based on actuals through May 14, 2021.

Expenses

Our plan for fiscal year 2019–20 called for total expenditures of $1,145K. Given the financial uncertainty caused by the COVID-19 pandemic, Wiki Education's board had given the ED more flexibility throughout the year with regard to the organization's spending. During the first two quarters of last fiscal year, we kept the monthly expenses at the lowest level possible. This included reducing the hours of the organization's three highest paid employees to 80%, deferring a large part of the ED's salary, and suspending all travel. These measures brought us through the critical time period between July and December 2020.

With our grant renewals coming in at a higher rate than expected and a PPP loan provided by the U.S. government, we were able to make a couple of critical investments in the last two quarters of the fiscal year. We brought on a part-time Executive Assistant in January and refilled our fundraiser position in mid-February. While two of our highest paid employees decided to stay at 80% weekly hours for the rest of the fiscal year, we moved our ED back to full-time in April and paid out the deferred salary. Due to performance issues with our Dashboard platform we had to make unplanned expenditures on a consultant who helped us adapt the software so it can easily be scaled up to handle higher loads. With regard to reducing or even eliminating our long-term liability in office rent, we were successful in finding a tenant who will take over our existing lease in the Presidio of San Francisco. At the time of the writing of this document, we are waiting for our landlord to send us the required documents for the transfer of the lease.

Table 6. Fiscal year 2020–21 Quarterly Expenses: Plan vs. Actuals

	2020–21 Plan	**2020–21 Actuals**	**Variance**
Q1	$297K	$269K	-$8K
Q2	$273K	$278K	+$5K
Q3	$294K	$450K	+$156K
Q4	$281K	$420K [1]	+$139K [1]

Notes:
[1]   Projections made based on actuals through May 14, 2021.

Human Resources

When the COVID-19 pandemic hit the United States, Wiki Education was among the first organizations to protect the health of its employees and make working out of a physical office optional. By the end of March 2020, we had closed our office in the Presidio of San Francisco permanently and moved the organization to 100% remote work. For Wiki Education, these steps were easier than for other organizations as we were used to a portion of our staff working remotely out of different states and timezones. Also, Wiki Education had been using the video conference software Zoom long before this specific software solution gained widespread popularity. That way, we were both familiar with what it means to work remotely, and also with the most common software solutions like Slack, Google Docs, etc.

Two of our seven staff members relocated during the pandemic. Our Director of Partnerships moved from San Francisco to Denver, Colorado, and our ED moved from the Bay Area to Chico in the Sacramento Valley. In September 2020, we rented a small office space in downtown Chico that currently serves as our new headquarters. In February 2021, we moved our furniture and all office equipment from the Presidio to Chico, and sold everything that we didn't need anymore locally.

Towards the end of September, after a review by our board's HR committee, we shared our new Harassment Prevention Policy with staff. In December and January, everyone on staff took the online Sexual Harassment Training delivered by California Department of Fair

Employment & Housing. Supervisors took the two-hour version; everybody else took the hour-long video training. Staff members will renew their certificate every other year.

During fiscal year 2020–21, we filled three positions. Victoria Padilla joined Wiki Education in January as part-time Executive Assistant based in Chico. With our ED filling in as acting Chief Financial Officer and as acting Chief Advancement Officer, Victoria provided much needed support for ensuring smooth day-to-day operations. In February, Kathleen Ramsey joined Wiki Education as Director of Donor Relations. Kathleen's main focus is on building new relationships to expand Wiki Education's prospect pipeline and to attract new donors; she works remotely out of Frederick, MD. In June, we wrapped up the hiring process for our second partnerships / sales position. Nanette James, currently based in Pasadena, CA, will join Wiki Education and work – together with our current Director of Partnerships – on recruiting institutional and individual customers for our Scholars & Scientists Program.

Also, in spring 2021, Evan Monk served as a marketing and communications intern. Evan is currently an undergraduate student at Vanderbilt University pursuing degrees in Human and Organizational Development and Psychology. When Evan wrapped up his internship, Reema Haque began hers in the same role. Reema is an undergraduate student at California State University Northridge, majoring in Communication Studies.

Looking ahead: the 2021–22 Plan

High-level view of the time ahead of us

We expect Wiki Education's operations in fiscal year 2021–22 to still be overshadowed by the COVID-19 pandemic, although it's unclear to which extent this will be the case. That's why Wiki Education will continue its cautious approach for fiscal year 2021–22. While we'll keep our Student Program at about the same level as last year, we'll carefully expand the number of courses in our Scholars & Scientists Program. With our guest instructor model having passed a successful test run last fiscal year, we will now move into fully implementing the model and stress-testing it with a larger number of courses.

Our work in the area of Technology will focus on providing better services to the international community of Wikimedia Program leaders. For that purpose, we'll cooperate with at least two other Wikimedia movement organizations to explore the feasibility of Dashboards-as-a-service. In order to better serve the needs of a growing number of Programs & Events Dashboard users, we will conduct a survey among existing users of our platform and create a road map based on the results.

Programmatically, we'll focus on two topic areas: Communicating Science and equity. Across both of Wiki Education's programs, we will strive to improve the quality of information available on Wikipedia and Wikidata, particularly in content areas related to science and equity. In line with our current strategy, we will also seek to broaden the Wikimedia community by supporting diverse program participants. We will also improve our support resources to reflect the needs of participants we recruit through these initiatives, with an eye toward scalability of our work. In both programs, our end goal is to make content on Wikimedia projects more accurate, representative, and complete.

Programs

Wikipedia Student Program

Goal: Provide quality and timely support for instructors and students

During the 2021–22 academic year, we will continue to provide instructors and students with effective and timely support for their Wikipedia assignments. We will strive to support

a similar number of courses in the fall and spring terms as last year, and to continue to innovate so that we can support a large cohort of courses with minimal staff time and input.

Goal: Conduct targeted outreach to new instructors

In the prior fiscal year, we did very little recruitment of new faculty into the Student Program. To continue expanding our impact in key topic areas, including our Communicating Science and equity initiatives, we will begin experimenting with recruitment mechanisms, with a goal of identifying what works in a post-pandemic world.

Goal: Evaluate and streamline instructions, prompts, and training material

Patterns in student and instructor questions suggest that there are points where instructions being given to students are unclear, or haven't been fully updated to reflect improvements to the Dashboard processes. We will carefully analyze the instructions given to students, identify any inconsistencies or contradictory information, and correct any problems we identify. We will improve the training modules to improve retention of information that is overlooked. We will convert guides which currently exist only as PDFs into forms that integrate better with the Dashboard.

Scholars & Scientists Program

Goal: Continue supporting synchronous Wikipedia and Wikidata courses

Based on the success of this program from 2020–21, we are confident that we'll be able to expand the customer base for our Wikipedia and Wikidata courses. We will continue to support the Advancement team's recruitment efforts with marketing these courses.

Goal: Build out guest instructor model

In fall 2020, we piloted a new course model where a course was taught by a guest instructor; we see this as a scalable solution to our program. This year, we will expand the program, including identifying new guest instructors, training them, supporting them, and evaluating their performance.

Targets
- 14,000 program participants
- 14,000 Wikipedia articles edited
- 10 million words added to Wikipedia

Technology

Goal: Support Wiki Education staff and programs

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

Targets
- Provide timely support for the technical needs of the organization

Goal: Maintain and improve the Dashboard's codebase and infrastructure

Keeping both Wiki Education Dashboard and Programs & Events Dashboard running smoothly is essential to the success of our programs as well as many others in the global Wikimedia movement. This means supporting the live websites as well as keeping the code and test suite up to date to ensure we can keep it running well into the future.

Targets
- 99.5% or greater uptime for dashboard.wikiedu.org
- 98% or greater uptime for outreachdashboard.wmflabs.org

Goal: Explore the feasibility of offering custom Dashboards as a service to others Wikimedia orgs

The shared Programs & Events Dashboard is a key resource for thousands of program organizers — enabling a swath of programs that bring in new content and contributors across the Wikimedia movement. Even so, it doesn't replicate the full scope of what Wiki Education gets from having our own Dashboard website branded, tuned and customized for our programs — which we can use for recruiting, onboarding, training, standardizing program activity timelines, managing programs, analyzing and reporting on program metrics, conducting surveys, and letting funders and others browse the full breadth of our programs. We think independent Dashboard sites for larger Wikimedia chapters and affiliates could allow them to leverage many of the additional features we benefit from. This year we will explore the feasibility of providing and maintaining independent Dashboard websites to Wikimedia entities who could benefit from the full power of it.

Targets
- Cooperate with at least two other Wikimedia organizations to explore the feasibility of Dashboards-as-a-service

Goal: Develop a roadmap for Programs & Events Dashboard movement needs and begin work

Programs & Events Dashboard has become essential infrastructure for the Wikimedia movement, tracking programs led by 1,558 different program leaders with more than 28,000 participants in 2020. We plan to put more resources into meeting the needs of the program organizing and reporting needs of movement, and as a prerequisite we need to understand what those needs are. To date, we've relied on informal connections with program organizers and affiliates to identify critical needs, without the kind of systematic user research we do for Wiki Education's own program needs. Early this year, we will conduct a survey of Programs & Events Dashboard users (using the Dashboard's own survey features), and use that to conduct follow-up research and build a roadmap for future development. Throughout the year, we'll provide opportunities for Dashboard users to ask questions and share their perspectives. We'll also begin working on implementing the roadmap, focusing on Wikidata needs — an area we're more familiar with — while we conduct broader user research.

Targets
- Conduct a survey of Programs & Events Dashboard users in July/August 2021
- Hold Dashboard office hours at least quarterly
- Publish a preliminary roadmap by October 2021

Communications

Goal: Engage in storytelling about the organization

Communications work supports program recruitment, fundraising, and marketing efforts from our earned income team. Through publishing blog posts, regular social media updates, engaging in marketing and/or advertising efforts, engaging with the Wikimedia community, and other outreach, we will support the organization's needs.

Targets
- Publish an average of 10 blog posts per month
- Support staff with communications needs as requested

Advancement

Fundraising

The main focus of Fundraising in fiscal year 2021–22 will be to expand our prospect and donor pipeline and lay the foundation for continued growth. At this point, grants and individual donations represent roughly 80% of our organization's funding. While the net amount of Wiki Education's earned income will increase, we don't expect it to account for significantly more than 20% of our total revenue in the near future. That means that the support from institutional funders and major donors will still be key for our efforts in revenue generation over the next couple of years. Our general approach in Fundraising will be to target larger institutional grantmakers and select individuals who are either aligned with our goal of educating the general public or who are interested in funding our efforts in the areas of "Communicating Science" and "Equity" (which reflect broader national conversations and align with our current organizational strategy).

Goal: Raise a total of $1.5 million from foundations, corporations, and major individual donors for Wiki Education's programmatic initiatives.

We will raise funds for initiatives that align with current events and will attract new and increased investments from institutional and major donors. Primary activities will include researching, qualifying, and cultivating foundation prospects through emails, phone calls, and introduction mailings. These prospects either currently exist in our Salesforce database or will be brand-new prospects identified as having the potential to support our Wikipedia Student Program.

To improve our long-term financial sustainability, we will also broaden our prospecting efforts to individuals with major gift capacity. However, we expect most of our revenue in fiscal year 2021–22 will be derived from renewals and upgraded gifts from past institutional supporters as well as from warm prospects.

Targets
- Research and vet at least 300 foundation prospects and solicit at least 30 new foundation prospects.
- Identify and cultivate 50 high net-worth individuals in target markets: Bay Area, NYC, and DC.
- Solicit 500 prospects or donors with major donor capacity in a targeted end-of-year campaign.
- Raise $1.5 million from foundations, corporations, and major individual donors.

Goal: Build the Advisory Board into an effective mechanism for fundraising

In order to further raise awareness of Wiki Education's work, we will continue expanding our Advisory Board. Each member of the Advisory Board will provide us with at least one lead to prospective donors (current grantees of target foundations), high profile individuals, experts, and influencers in key areas of programmatic focus (science, policy, climate, equity, education, OER/OEP, GLAM, Wikimedia), as well as prospective donors (high net-worth individuals and foundation staff). This effort will help us expand our prospect pipeline and get introductions to potential funders and influencers as opportunities arise.

Targets
- Utilize the Advisory Board to make introductions to at least 20 decision makers at grantmaking institutions as well as high net-worth individuals.

Earned Income

Goal: Partner with institutions to provide our services, generating revenue and program participants to add high-quality information to Wikimedia projects.

To continue bringing in subject-matter experts for Wikimedia projects and unrestricted funding for Wiki Education, we will partner with institutions who see a benefit in sponsoring activities to train their members, employees, or other stakeholders how to add to Wikipedia, Wikidata, and other Wikimedia projects. We will continue partnering with academic associations, research institutes, galleries, libraries, archives, museums, and universities. This year, we aim to understand additional markets for our training courses, specifically in how we can expand the Wikidata trainings to customers beyond libraries, archives, and museums.

Targets
- Generate at least $320,000 through Scholars & Scientists program service fees.
- Partner with like-minded institutions, running at least 30 training courses or other programs.

Goal: Increase Wiki Education's visibility as an expert in training new users on Wikipedia and Wikidata and a reliable partner who can help institutions achieve their goals.

Now that we have three years of experience training academics and other subject-matter experts on how to add high-quality content to Wikipedia and Wikidata while becoming a part of these communities, we are poised to champion this work and share successes, reaching new prospective customers. We will prioritize marketing and communications work that highlights Wiki Education's work in helping our partners and program participants achieve their goals.

Targets
- Determine messaging and create marketing materials around at least two "institutional benefits" of sponsoring a Scholars & Scientists course for members, employees, or other stakeholders.
- Develop at least two "demos" as marketing materials to show prospective partners the value of our training programs.
- Give at least 10 presentations (either virtual or in person) to an audience of prospective Scholars & Scientists program participants or partners.
- Increase the number of subscribers to our Wikidata Newsletter by 15% (baseline: 3,471 subscribers).

Projected Revenue

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

Table 7. Projected revenue, by quarter, for fiscal year 2021–22.

	Q1	**Q2**	**Q3**	**Q4**	*TOTAL*
Revenue Total	$305K	$385K	$870K	$260K	*$1,820K*
Fundraising	$235K	$315K	$800K	$150K	*$1,500K*
Earned income	$70K	$70K	$70K	$110K	*$320K*

Expenses

In Q3 and Q4 of fiscal year 2020–21 we made investments in two revenue-generating staff positions. Fiscal year 2021–22 will be the year to reap the fruits of this investment while keeping the expenses in check.

Compared to the year before, our expenses will be slightly higher, due to the fact that our staff headcount will be 9½ instead of 7. We will also move the remaining two highest-paid employees back to full-time. Also, we're budgeting for two in-person all-staff and two board meetings, which might have to take place virtually depending on how the COVID-19 pandemic develops. Finally, based on a thorough review of our salary structure and

encouraged by our board, we will make adjustments to the salaries of each staff member, except for the ED whose salary had been adjusted earlier.

Table 8. 2021–22 Plan revenue and expenses.

	2021–22 Plan
Revenue	$1,820K
Expenses	$1,820K
General & Administrative	$375K
Programs	$623K
Technology	$260K
Advancement [1]	$562K

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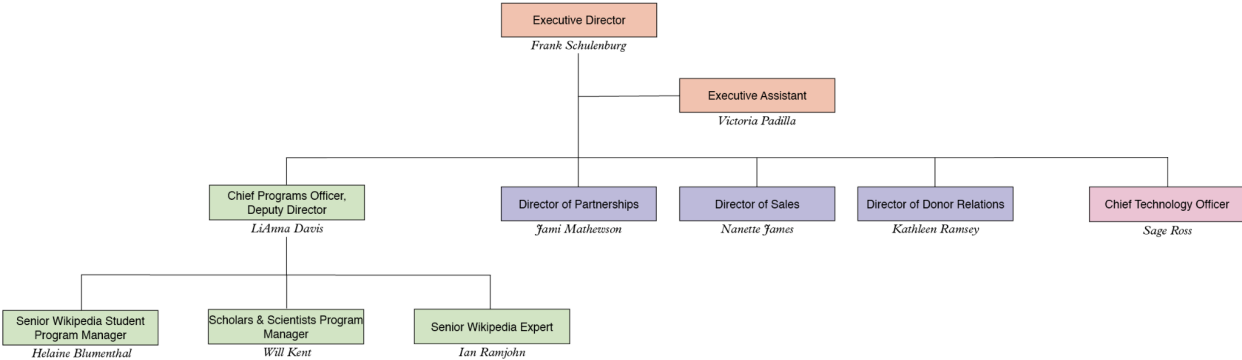[1]   Large parts of Advancement activities will be programs-related.

Human Resources

Although a certain percentage of our staff has traditionally worked remotely, Wiki Education always took great care to ensure that people had sufficient opportunities to meet in person. In fiscal year 2021–22, assuming it is safe to do so, we will bring back our in-person all-staff meetings in July and February, which we paused during the pandemic. We will also explore new ways of creating opportunities for staff members to work together in person occasionally ("Meet-your-coworker" program).

With Wiki Education operating in a highly complex environment, our organization traditionally values professional development greatly. While we had to cut professional development measures from our HR budget last year, we will bring them back for fiscal year 2021–22.

Unless we embark on new projects funded through restricted grants or our revenue significantly exceeds our expectations, we won't hire any new staff members in fiscal year 2021–22.

Figure 1. Organizational chart for fiscal year 2021–22

Board Resolution

RESOLVED, that the Board of Trustees hereby approves management's proposed 2021–22 annual plan, which includes $1,820K of revenues, $1,820K of spending. If, during the year, management anticipates the spending at each quarter-end will differ materially from the plan, the Board directs management to consult the Treasurer and the Chair of the Audit Committee promptly. Reference: Management's currently anticipated quarterly breakdown of this approved annual plan.

Table 9. Quarterly breakdown of the Annual Plan financials 2021–22

2021–22 Plan	Q1 (Jul.–Sep.)	Q2 (Oct.–Dec.)	Q3 (Jan.–Mar.)	Q4 (Apr.–Jun.)	Total
Operating Cash [1]	$779K [2]	$652K	$567K	$988K [4]	
Cash Revenues [3]	$305K	$385K	$870K	$260K	$1,820K
Cash Spending	$433K	$470K	$449K	$468K	$1,820K

Notes:

[1]   As of the beginning of the quarter.
[2]   Operating cash available at the beginning of the fiscal year (July 1) is based on projected expenditures and expected unspent funds carried forward from fiscal year 2020–21 as per May 14, 2021.
[3]   Anticipated/projected revenue.
[4]   Anticipated cash of $779K to be available at the start of fiscal year 2022–23.

Appendix

Risks considered in developing the 2021–22 plan

1. Stock market volatility leads grantmakers to reduce giving.

Since the beginning of the global COVID-19 pandemic in 2020, the Dow Jones has grown at a dramatic pace. At the time of the writing of this document, analysts have become increasingly worried about the fact that a growing number of investors have been buying stocks with borrowed money (investor Mike Burry who became famous for foreseeing the subprime mortgage crisis said end of February 2021: "The market is dancing on a knife's edge"). With the Financial Industry Regulatory Authority (FINRA) showing the rate of "buying on a margin" steadily increasing (70% increase between March 2020 and March 2021), the risk of a market correction is high. That's relevant to Wiki Education because most institutional grantmakers tend to protect their endowments whenever the stock market experiences a sharp downturn. As long as institutional grants make up ~80% of our total annual revenue, any negative market event will have severe consequences on our ability to raise enough funds. At the same time it's unlikely that Wiki Education's earned income stream will grow fast enough to truly mitigate this specific risk for fiscal year 2021–22.

2. Staff turnover leads to challenges in meeting all goals.

In prior fiscal years, Wiki Education devoted significant effort to planning a resilient organization, with staff being cross-trained to ensure we could continue to thrive organizationally in the event of a sudden departure or illness among any staff member. This resilience work paid off last fiscal year, when we had to make a significant reduction in headcount within the organization. As our financial footing has become firmer, we have cautiously started to build back the resiliency in our organization, initially adding back staff in the revenue-generation side of the organization. In the programs and technology side, however, we still lack significant resiliency. The guest instructor program we launched last year provides some mitigation within the Scholars & Scientists Program, but we recognize staff turnover in the programs or technology departments would be significantly detrimental to our ability to meet our goals. If revenue significantly exceeds expectations, addressing this gap will be one of our top priorities.