Wiki Education

2022–23 Annual Plan

Table of Contents

Looking back: 2020–21

A Year in Review

Fiscal year 2021–22 was Wiki Education's second year during the global COVID pandemic. It was also the second year of supporting ten thousands of instructors, students, subject-matter experts, and Wikimedia program organizers with a much reduced number of staff members. Yet, despite all the difficulties we faced, we're very proud of how much our work made a difference during the past twelve months.

One of our organization's key focus areas has traditionally been the work that Wiki Education is doing in the field of Knowledge Equity. Not only do our programs make a significant difference in students having a deeper learning experience and diversifying Wikipedia's editor base in the United States and Canada, our program participants also keep adding high-quality content about Knowledge Equity-related topics to Wikipedia. Take, for example, Nneka Dennie's class "Introduction to Black Women's History" at Washington and Lee University in Lexington, Virginia. Students in Nneka's class added a new article about *[Disability in American slavery](#)* to Wikipedia. The article is well written, based on most recent research, and covers a topic that might otherwise not get much attention. Overall, the nine students in Nneka's class added three new articles, and improved 12 existing ones. Given that none of these students had ever edited Wikipedia prior to the class, and that Nneka had never used Wikipedia as a teaching tool before, we're amazed by how much quality content they created together in a relatively short amount of time.

Another example of our recent work in the Knowledge Equity area is Maya Smith's class "Cultures of Franco-America" at Washington University in Seattle. Like Nneka, Maya was one of our first-time instructors last fall term. Over the course of eleven weeks, Maya's students improved 19 articles, created one new article, and added a total of 28 thousand words. Article topics reach from *[The Jesuit Relations](#)*, reports from Jesuit missionaries in the field to their superiors to update them as to the missionaries' progress in the conversion of various Indigenous North American tribes to *[The Big Sea](#)*, an autobiography by Langston Hughes in which he tells his experience of being a writer of color in Paris, and his experiences living in New York where he faced injustices surrounding systematic racism. Based on the enormous publishing power of Wikipedia, the 22 students in Maya's course reached an audience of more than 200,000 with their work. At Wiki Education, we know

how much it means to students to reach such a large number of people, and we're deeply impressed by the fact that articles improved or newly written during the fall 2021 and the spring 2022 term combined account for almost 300 million page views on the English language version of Wikipedia. We sometimes wish that "Teaching with Wikipedia" was already around when we went to college!

Figure 1. Data provided by the Wikimedia Foundation gives a good impression of how much our work makes a difference when it comes to bringing people of color to Wikipedia.

Race and ethnicity of US Wikipedia editors, population, and Wiki Education's program participants

Category	Among US population	Among Wikipedia editors in the U.S.	Among Wiki Education's program participants
Black or African American	13%	0.50%	10%
Hispanic or Latino/a/x	18%	5.2%	13%
Native American	0.9%	0.10%	2%
Asian or Asian American	5.7%	8.8%	21%
Biracial, Multiracial, or other			8%
White (non-Hispanic)	72%	89%	60%

Beginning with the "Wikipedia Year of Science" in 2016, our organization's second area of focus has been on strengthening Wikipedia's role as a vehicle for science communication. Given that aspiring scientists need to know how to share insights about their work with the general public, many thousands of students so far have greatly benefited from participating in Wiki Education's Student Program. Not only have they learned how to translate their knowledge in a way that is understandable for an average reader, they have

also greatly enhanced the depth and breadth of freely accessible information about scientific topics on the web. And while the majority of new science-related content gets generated through our Student Program, we've taken our "Communicating Science" efforts to the next level when we launched our Scholars & Scientists Program in 2018. In online courses stretching over six weeks, we empower subject-matter experts to share their specialist knowledge with others through Wikipedia or Wikidata.

Take Tristan Fehr (image) for example, who is a postdoctoral fellow in neuroscience and an expert in the effects of early-life exposures to anesthesia on the brain. This fiscal year, Tristan took a Wikipedia course sponsored by the National Science Policy Network, one of Wiki Education's academic partners. The course gave Tristan insight into best practices for editing Wikipedia, both in terms of policy and culture among the community of Wikipedia contributors. Being asked about his experiences, he said:

"When I read articles now, I am more aware of how easy it would be to add to and edit them, and it makes the whole experience feel more alive. In many respects Wikipedia is such an obvious choice for public communication of complex topics that I overlooked it as a writing outlet before—but now I know how easy it is to write and edit, it seems definitely like a missed opportunity to not learn how to get involved."

After all, Tristan says, Wikipedia comes up first on many search engines, so articles serve as primary bridges between subject matter experts and members of the public. At Wiki Education, we're tremendously happy about the feedback we get from subject-matter experts like Tristan. In fiscal year 2021–22, 95% of our course participants reported that our Wikipedia and Wikidata courses met or exceeded their expectations – a testament to the high quality of our offerings.

In order to measure the impact subject-matter experts like Tristan or the many thousands of students have on Wikipedia and on Wikidata, we created our own software platform in 2015. Our work on this critical technical infrastructure last year continued to empower thousands of Wikimedia organizers in different countries around the globe who run their

own Wikipedia or Wikidata-related programs. In order to even better serve these volunteers, we improved the stability and scalability of our *Programs & Events Dashboard*, and added new, much desired features to our software. One example of new software features is the ability of our software to track and visualize the improvements people make to Wikidata, the structured open data repository that powers virtual assistants like Siri or Alexa.

Figure 2. As of this fiscal year, our Dashboard platform is also able to track Wikidata edits – a key new feature given that Wikidata plays an increasingly important role in providing people with accurate and trustworthy facts.
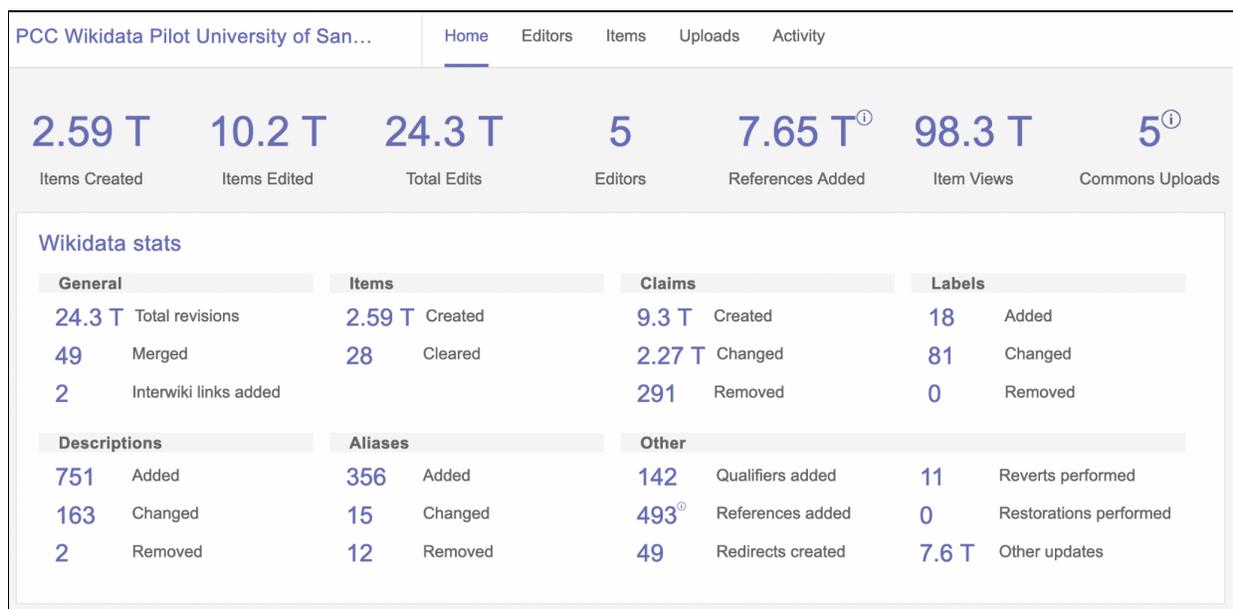
Our work in this area started with an overhaul of the system's interface messages to add Wikidata-specific terminology before integrating Wikidata edit analysis into the Dashboard's data update system. We deployed under-the-hood changes in February to begin collecting the data we would need — edit summaries from all tracked Wikidata edits. The final step was to add a visualization of that data, which you can see in action [here](#).

Another example of critical infrastructure work accomplished this year is the move of the Authorship Highlighting feature from an external service to the Wikimedia Cloud, the Wikimedia community's cloud computing system. Authorship highlighting is an essential tool for the many instructors that use our Student Program Dashboard in their classes. Given that this feature makes grading students' work much easier, we consider it essential for the future of our program. When we learned that the GESIS research institute (Leibniz Institute for the Social Sciences in Mannheim, Germany) that hosted data essential for our

Authorship Highlighting feature would shut the data service down, we decided to work with the software engineers at the Wikimedia Foundation to get a replacement server ready. As a result of our work, the people at GESIS released the code of their server software under a free license and today, after the successful move of the service, the data for our Authorship Highlighting tool comes reliably from Wikimedia servers.

Having reached the end of fiscal year 2021–22, we're very happy about the enormous impact our organization had despite the challenging conditions we've been operating under over the course of the past two years. This success has been made possible by our generous funders, the excellent work of our board, Wiki Education's healthy relationship with the community of Wikimedia volunteers, the tremendous dedication of our staff, and the thousands of students, instructors, and subject-matter experts enrolled in our programs.

Programs

Wikipedia Student Program

Goal: Provide quality and timely support for instructors and students

We achieved this goal both quantitatively and qualitatively. We maintained similar numbers of courses in the 2021–22 academic year with a slight uptick in new instructors and a slight drop off in returning instructors during the Spring 2022 term. In addition to our typical range of support, we offered weekly office hours beginning in Fall 2021 and hosted an intro video session at the beginning of the Fall and Spring terms. We also continued the mentorship program as well as held a faculty panel to engage both new and returning instructors during both terms.

Goal: Conduct targeted outreach to new instructors

We began to explore a series of new outreach mechanisms during the 2021–22 academic year. We learned that posting on academic sites, such as H-Net and Linguist List, proved effective in recruiting new faculty and raising our visibility. We also found that posting on various academic Facebook groups also proved effective in recruiting new faculty to the student Program. In Fall 2021 and Spring 2022 we ran two faculty panels wherein experienced instructors in our program spoke about their use of the Wikipedia assignment. These sessions proved incredibly effective in obtaining the contact information of potential

new instructors in the Student Program in a relatively easy and cost effective manner. Each panel resulted in more than 100 new contacts for us to reach out to for future terms. We are as yet unable to discern how many of these contacts will pursue the actual project, but the sessions raised our visibility more generally.

Figure 3. New and returning classes in the Wikipedia Student Program, 2010–2022.

Academic Year (pale colors represent Wikimedia Foundation-led program; dark colors represent Wiki Education-led program).
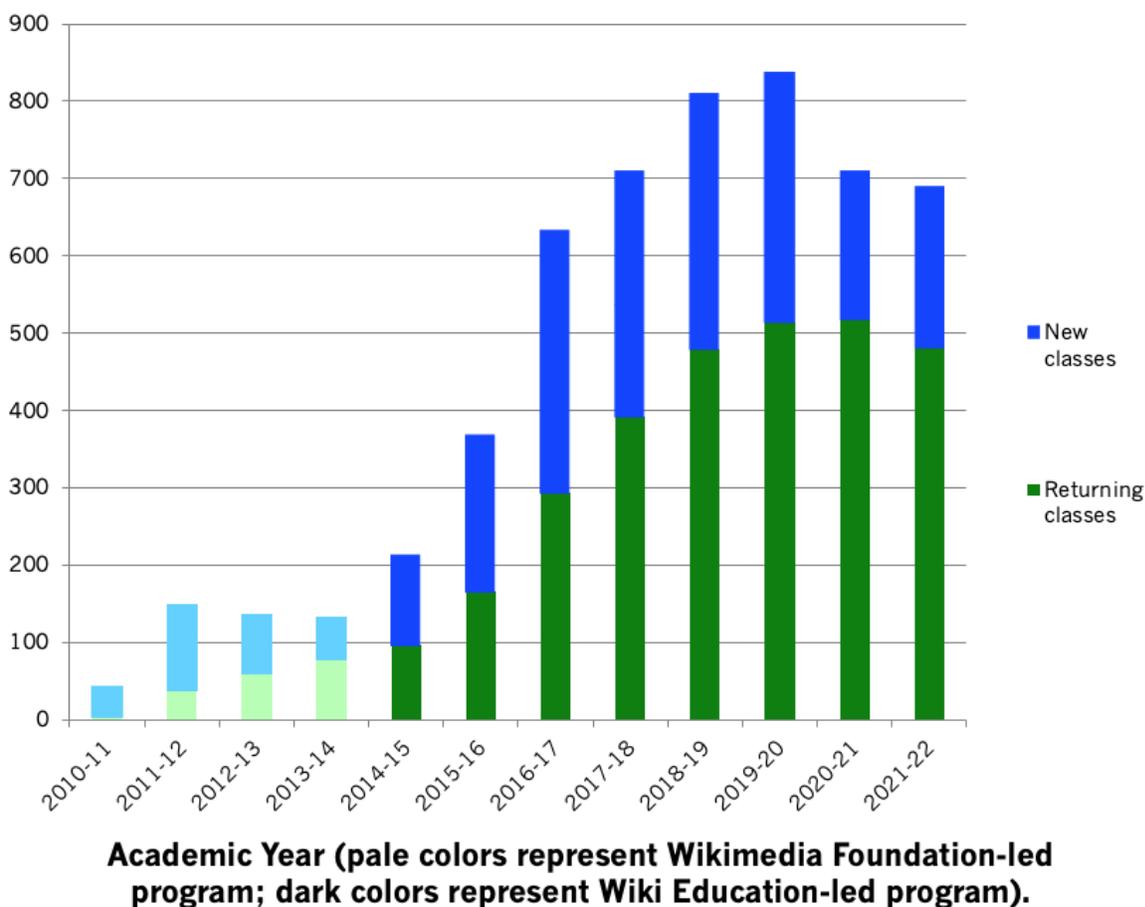
Goal: Evaluate and streamline instructions, prompts, and training material

We began work on this project. Our analysis of student editing led to us identifying gaps in our ability to monitor certain areas where student editors were likely to run into problems. The addition of new alerts on the Dashboard have allowed us to better intervene in these areas. We believe there is more work to be done in this area; thus, we propose to continue this work into next fiscal year.

Wiki Scholars & Scientists Program

Goal: Continue supporting synchronous Wikipedia and Wikidata courses

We were able to maintain an active calendar for both Wikipedia and Wikidata offerings, although we ran a much lower number of courses than expected. With Wikipedia we were able to continue our partnerships with organizations like 500 Women Scientists, the American Physical Society, and the Smithsonian Affiliate Museums. We were also able to pilot new courses with the American Institute of Graphic Arts (AIGA), ReThink Media, as well as a course themed around underrepresented LGBTQ+ individuals. These new partnerships demonstrated the ability for this program to expand into new areas of focus to improve new areas of content on Wikipedia.

Of the six Wikidata courses we offered, one was our first group-payer course. The New York Data Carpentries Library Consortium, a library consortium in upstate New York, sent 20 participants to the Wikidata Institute. We're hopeful this model will lead to more group-payer courses. We also participated in several speaking engagements and conference sessions, promoting the course, and building community in both established and new areas.

Goal: Build out guest instructor model

Given the lower number of course sales than expected, in fiscal year 2021–22 there was no need for guest instructors yet. The curriculum and staff support remain at-the-ready for this upcoming year.

Targets

Table 1. Targets for Programs in fiscal year 2021–22: goals and projected actuals.

Description	Goal	Projected actual	% achieved	Notes
Program participants	14,000	12,700	91%	We did not grow our Scholars & Scientists Program as much as expected, so we missed this goal
Wikipedia articles edited	14,000	13,500	96%	Similarly, we just missed this goal.

Content added to Wikipedia	10 million	10 million	100%	

Technology

Goal: Support Wiki Education staff and programs

The headline project for this year was the redesign of our wikiedu.org WordPress website, including course sales pages and our blog, which went live in February. We worked with a contractor through the platform codeable.io to design and develop a new WordPress theme (see figure 4 next page). While the project took longer than expected, we are very happy with the result — the quality of the design as well as the maintainability and adaptability of the theme code. We also made a bevy of small but important improvements to the Dashboard's handling of key aspects of the Wikipedia Student Program, both for helping staff keep up with critical stages of the semester cycle and providing guidance to students completing their Wikipedia assignments.

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

After last year's transition to using infrastructure-as-code to make Wiki Education Dashboard into a distributed system, we focused this year on improving and learning to better manage this system. Both the work itself and the effort to bring in contractors to implement it were more challenging than anticipated. In response to an unexpected system failure, we switched back to a more conventional infrastructure configuration in May. Fortunately, the core Dashboard app is robust enough to run in either configuration relatively easily.

We continued our strategy of using extensive automated tests to ensure that all the critical parts of the Dashboard's code continue working as intended, and migrated to a more reliable "continuous integration" provider to run these tests for each proposed code change. The comprehensiveness and maturity of our test suite has been increasingly useful for interns and volunteers who work on major Dashboard changes.

Figure 4. Screenshot of our redesigned WordPress website
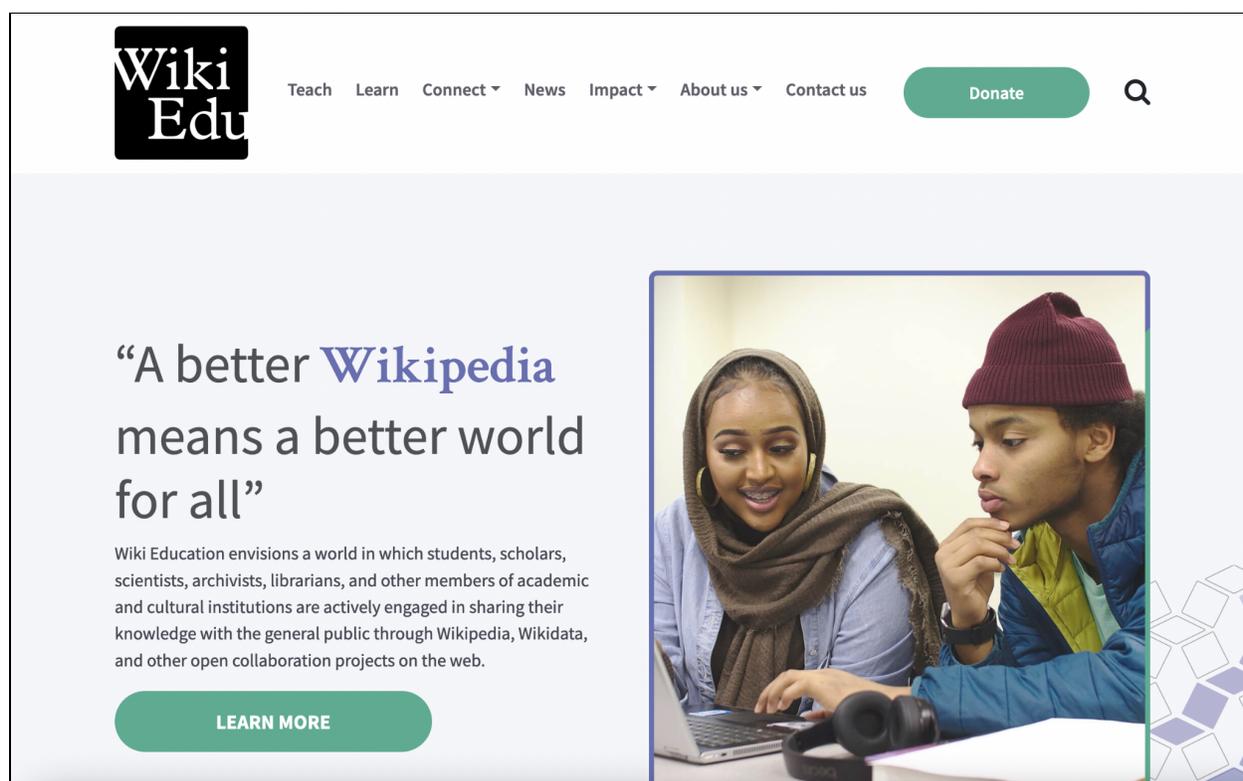
We also worked with Wikimedia engineers to streamline, deploy, and maintain a replacement server for the "WikiWho" API service that provides the data for the Dashboard's Authorship Highlighting feature. This service was previously provided by a team of European researchers, but the end of support was announced for 2022.

Goal: Explore the feasibility of offering custom Dashboards as a service to others Wikimedia orgs
The prerequisite infrastructure-as-code work for this was more complex than expected, but was completed in Q2. However, initial user research turned up important considerations that make the project itself more complex than we planned for as well. We deprioritized it for 2021–2022, and may seek grant support for taking it up again in the future.

Goal: Develop a roadmap for Programs & Events Dashboard movement needs and begin work
We completed the first Programs & Events Dashboard user survey in Q1, and used the results to create a prioritized roadmap in Q2. Among the top priorities, we built a major new feature for displaying detailed Wikidata editing statistics (thanks to Outreachy intern Ivana Novaković-Leković), and we started work on making it easier to manage related and overlapping campaigns.

We also completed the first stages of collaboration with Wikimedia Foundation's new Campaigns product team, which is contracting with us to enable integration between the Dashboard and their upcoming "Events Center" features for organizing editing campaigns.

Targets

Table 2. Targets for Technology in fiscal year 2021–22: goals and projected actuals.

Description	Goal	Projected actual	Notes
Uptime for wikiedu.org & dashboard.wikiedu.org	99.5%	99.4% (estimated)	
Uptime for Programs & Events Dashboard	98%	99.7% (estimated)	
Provide timely support for the technical needs of the organization			
Cooperate with at least two other Wikimedia organizations to explore the feasibility of Dashboards-as-a-service		Plans shifted	
Conduct a survey of Programs & Events Dashboard users in July/August 2021		Launched in July	
Hold Dashboard office hours at least quarterly		Started office hours in Q3	
Publish a preliminary roadmap by October 2021		Completed in November 2021	

Communications

Goal: Engage in storytelling about the organization

Throughout the year, we supported staff in Programs and Advancement with communications needs. We regularly published blog posts sharing the story of our programmatic impact. We also drafted content in support of fundraising and earned income efforts. In the second half of the year, we worked with a public relations firm in an attempt to generate media coverage of our work; we found this more challenging than anticipated and are currently evaluating the reasons for this.

Description	Goal	Projected actual	Notes
Publish an average of 10 blog posts per month	10	10	

Advancement

Fundraising

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

In fiscal year 2021–22, we cultivated and solicited institutional and select major donors that had supported us in the past, while also making a big push to expand our pipeline of new prospects. As a result, we had more than 40 meetings with connectors and potential funders during the year. We had success with reactivating Broadcom Foundation, some major individual donors, and receiving new invitations to submit letters of inquiry from PCORI, the Guru Krupa Foundation, and Voqal. We were also successful in increasing our Annual Plan Grant from the Wikimedia Foundation and signed a two-year grant agreement with them. Moreover, in Q4 we were able to generate verbal commitments for significant funds that will be disbursed in Q1 of next fiscal year. Although this success is based on our fundraising efforts this fiscal year, they will be reflected in next year's report. As a result, Table 3 and 4 below ("Targets for fundraising" / "Fundraising revenue target vs. actuals by quarter") don't show all results of our fundraising efforts this year.

Despite our overall success, we had difficulty connecting with leads, or had to disqualify prospects or make plans to revisit them in another fiscal year. These challenges led to a lower than expected letter of inquiry and proposal submission rate. That's why, in Q3, we pulled a new list of about 1,500 foundation names from our new prospect research database, *Foundationsearch*, in an effort to supercharge our pipeline. From this list, we sent introductory emails and made phone calls to the most promising prospects.

During our Giving Tuesday email campaign we learned that while the new iWave software has been very useful for screening an individual's connections, wealth, and prior philanthropy to make a personalized pitch, it is not ideal for donor acquisition. Approximately 40% of the emails to fundraising prospects from iWave on Giving Tuesday bounced and did not make it to the intended individual for solicitation.

Towards the end of the year, we had a small number of in-person meetings with prospects in the Bay Area. The fact that these meetings didn't result in donations confirms our assumption that targeting major donors who're currently in the 60+ age group isn't working for Wiki Education. Our potential target group consists of people who are tech-savvy and grew up with Wikipedia ("W. got me through college"). High-net-worth individuals in our ideal target group are therefore much younger. However, the younger generation of high-net-worth individuals is getting pushed towards moving funds into Donor Advised Funds, instead of establishing their own family foundation (like people in the older generation did.) This adds an additional barrier Wiki Education would need to overcome to access the money of this specific type of major donor.

In fiscal year 2021–22, we also made investments in changes that will have long-term positive effects on our fundraising efforts. We found that our Salesforce database needed to be further adjusted to better meet fundraising needs, including a way to easily track "moves" and the status of each prospect. We worked with a consultant through Q2 for Salesforce training and made substantial progress with configuration for serving fundraising needs. In coming fiscal years, this will allow us to more easily organize prospects and more accurately track how many, and what type of outreach attempts we are making to secure a grant or donation. Additionally, we worked with a consultant to create a *Case for Support* brochure to communicate clear messaging of our organizational needs to fundraising prospects. A total of 50 *Case for Support* printed brochures were distributed to potential funders. While both of these projects took a lot of time and effort,

they laid the necessary groundwork for communicating our funding priorities to prospective donors.

Table 3. Targets for Fundraising in fiscal year 2021–22: goals and projected actuals.

Description	Goal	Projected Actual	Notes
Research, vet, and solicit new foundation prospects	300 to research and vet; 30 to solicit	1,800; 20	The differences in these figures are explained above
Identify and cultivate high net-worth individuals in target markets: Bay Area, NYC, and DC	50	60	These individuals were almost exclusively in the Bay area with a handful in Houston and NYC
Solicit prospects or donors with major donor capacity in a targeted end-of-year campaign	500	1,491	End-of-year campaign targeted high-net-worth individuals in our programs, previous fundraising prospects in Salesforce, and iWave prospects
Raise $1.5 million from foundations, corporations, and major individual donors	$1,500K	$865K	In Q4, we were able to get commitments for significant funds that will be disbursed at the beginning of next fiscal year; those fundraising results

			are not reflected in this table

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

We successfully onboarded five new members to Wiki Education's Advisory Board:

1. [Peter Kaufman](#)
2. [Todd Siegel](#)
3. [Lorraine Hariton](#)
4. [Richard Culatta](#)
5. James Donovan

We're on track for each of these Advisory Board members to have provided at least one lead by the end of the fiscal year, including current grantees of target foundations, high profile individuals, experts, and influencers in key areas of programmatic focus. It took longer than expected to add members to the Advisory Board, and in combination with our Advisory Board members' busy schedules, has delayed our ability to meet our target number for introductions. Given that we're still in an experimental phase and also given that we learned a lot during this process, we expect to get better going forward and meet at least 15 decision makers at grantmaking institutions in fiscal year 2022–23.

Table 4. Fundraising revenue target vs. cash-basis actuals for fiscal year 2021–22, breakdown by quarter

	Target	Actual	Notes
Q1	$235K	$155K	Due to the fact that one disbursement was delayed, the subsequent match moved to Q2
Q2	$315K	$148K	Our year-end results were lower than expected

Q3	$800K	$561K	This result is lower than expected, given that one of our long-term funders decided to no longer match funds
Q4	$150K	$1K [1]	Q4 commitments for funds that will be disbursed in Q1 of next fiscal year are not included
Total	$1,465K	$865K	

Notes:
[1]   Projections made based on actuals through May 16, 2022.

Earned income

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

We partnered with several institutions to run 14 Scholars & Scientists courses this fiscal year. We supported 200 participants as they learned how to contribute content to Wikipedia and Wikidata, adding high-quality information in their area of expertise. Due to staffing issues during the year, we had less capacity than we anticipated in selling our services. We did not meet our numeric goal of running 30 courses, but the partners we did collaborate with brought high-quality information to the public, reaching more than 8 million people through Wikipedia contributions alone.

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.

This year, Wiki Education staff spoke at several events to share their expertise as Wikipedians and Wikidatans. We presented case studies of past successful partnerships in order to recruit new partners, and we encouraged individuals to imagine how they can participate in our Scholars & Scientists courses in order to advance their work at their institution. Overall, we presented to at least 13 audiences, including members of the

American Institute of Graphic Arts, the Society of Family Planning, and the Association for Education in Journalism and Mass Communication. We recruited Wikidata Institute participants at the LD4 and EduWiki conferences. We shared our work with the Wikimedia communities through Wikimania, Wikidata Con, and WikiConference North America. Finally, we presented to academic faculty at California State University, Chico, the University of Toronto, the University of Virginia, Michigan State University, and Rutgers University.

During this year's website revamp, we identified the following benefits and opportunities for institutions who partner with Wiki Education: amplify research to the general public; increase Wikipedia's diversity, equity, and inclusion; and bring employees into the Open Data Movement. In addition to pitching each of these offerings on our website, we have developed several case studies and proposal templates to use when marketing Scholars & Scientists courses to prospective customers.

We continue prioritizing our "list-building" of data professionals and others who are well-suited to participate in the Wikidata Institute. We collect contact information of presentation attendees, add a pop-up to relevant web pages to collect visitors' contact information, and continue subscribing people to our periodic Wikidata newsletter.

Targets

Table 5. Non-revenue target vs. actuals for fiscal year 2021–22

Description	Goal	Projected actual	Notes
Partner with like-minded institutions for Scholars & Scientists courses	Run 30 Scholars & Scientists courses or other revenue-generating programs	We ran 14 Scholars & Scientists courses this fiscal year.	
Create marketing materials of institutional benefits	Develop at least two "demos" as marketing materials	We developed 5 proposal templates, a sales demo slidedeck	

of working with Wiki Education		template, and a [new landing page](#) on wikiedu.org.	
Increase visibility of Wiki Education as experts	Give 10 presentations to audiences of prospective customers	We gave 13 presentations and talks to various audiences	
Increase pipeline of Wikidata Institute prospects	Increase the number of subscribers to our Wikidata newsletter by 15% (baseline: 3,471 subscribers)	As of April 2022, we have 4,805 subscribers	This represents a 38% increase.

Overall, we created less earned revenue through our Scholars & Scientists Program in Q2 through Q4 than expected. Based on the fact that (a) we were eager to grow our revenue in this area, and (b) that we anticipated our Director of Partnerships being on a parental leave in parts of Q2 and Q3, we filled a second position in Sales in Q1. The new hire's role was to get quickly up to speed, fill in for our Director of Partnerships during her parental leave, and then bring our earned revenue to a new level in Q4. Although we still think that this plan was well thought out, we discovered in Q2 that our new hire wasn't able to make any sales. We took action and parted ways with our new hire at the beginning of Q3. Given that our sales projections were based on the assumption that our new hire would be effective in identifying new customers and closing sales, we missed our ambitious quarterly targets in Q2 though Q4.

Table 6. Earned income target vs. cash-basis actuals for fiscal year 2021–22, breakdown by quarter

	Target	Actual	Difference
Q1	$70K	$94K	+$24K
Q2	$70K	$38K [1]	($32K)

Q3	$70K	$27K [2]	($43K)
Q4	$110K	$30K [3]	($80K)
Total	$320K	$189K	($131)

Notes:
[1] Lower revenue than anticipated due to the fact that our new hire wasn't able to make any sales while our Director of Partnerships was on parental leave.
[2] Lower revenue than anticipated due to the fact that we parted ways with our new hire in Sales at the beginning of the quarter.
[3] Lower revenue than anticipated due to the fact that we received a major funding commitment for capacity building in our earned revenue work instead of a sponsorship for nine courses. Projections made based on actuals through June 1, 2022.

Expenses

The spending projections in our annual plan for fiscal year 2021–22 have proven to be extremely solid. We finished each quarter very close to what we expected at the beginning of the fiscal year. This is a result of less complexity due to our approach of stabilizing the organization's revenue prior to refilling staff positions or adding any other major new expenses.

Table 7. Fiscal year 2021–22 Quarterly Expenses: Plan vs. Actuals

	2021–22 Plan	**2021–22 Actuals**	**Variance**
Q1	$433K	$421K	($12K)
Q2	$470K	$458K	($12K)
Q3	$449K	$438K	($11K)
Q4	$468K	$420K [1]	($48K)
Total	$1,820K	$1,737K	($83K)

Notes:
[1] Projections made based on actuals through May 16, 2022.

Human Resources

As planned, we didn't fill any new positions in fiscal year 2021–22. After Victoria Padilla, the Chico-based part-time Executive Director's assistant left Wiki Education, former Executive Assistant Özge Gündoğdu rejoined and provided support on an hourly basis remotely from San Francisco.

When it became clear that the new hire for our second Sales position wasn't able to succeed in her role, we parted ways in early 2022.

We're very proud of the fact that Wiki Education provides excellent benefits to its staff. Given that paid parental leave policies significantly improve maternal physical and mental health by allowing mothers time to recover from childbirth and adjust to new caregiving responsibilities, Wiki Education established a generous parental leave policy. When our Director of Partnerships gave birth to a daughter in December, we provided her with a fully paid maternity leave.

We also explored new ways of creating opportunities for staff members to work together in person occasionally ("Meet-your-coworker" program). Given that these funds have barely been used, we will not continue this program going forward.

Looking ahead: the 2022–23 Plan

Setting Wiki Education on a path of renewed growth

The instant availability of knowledge on digital devices has deeply impacted the way humans learn about the world around them. Wikipedia, and increasingly Wikidata as well, are playing a key role in this "knowledge revolution" of the early 21st century. In a world where facts and the truth have been under attack, Wiki Education's work in providing the public with trustworthy and accurate information has proven to be crucial for an informed citizenry. We're currently the only organization worldwide that is able to improve the public's understanding of key issues in a targeted way at scale. Also, our work at institutions of higher education is equipping students with important 21st century skills, in particular with regard to their information literacy. Furthermore, Wiki Education has been at the forefront of Knowledge Equity initiatives bringing more diverse contributors to Wikimedia projects, while also increasing the visibility of underrepresented groups, e.g. when it comes to biographies of people of color in STEM that serve as role models for students in technology and engineering at diverse institutions. And finally, Wiki Education is empowering Wikimedia program leaders across the globe to track and evaluate the outcomes of their own programs, moving our organization's impact way beyond the borders of the United States and Canada. To sum it up: our work deeply matters.

That's why, after leaving the first two years of the global COVID-19 pandemic behind us, 2022–23 will be the year for bringing the organization back on a path of increased impact. Going forward, we will

- engage a greater number of instructors, students, and subject-matter experts in targeted campaigns aimed at improving Wikipedia's and Wikidata's coverage of topics that are of interest to the public
- invest in broadening our footprint at diverse institutions through targeted outreach measures in our ongoing effort of bringing a more diverse group of editors to Wikipedia and ensuring the student learning that comes from a Wikipedia assignment is accessible to diverse participants
- experiment with new and fresh programmatic angles aimed at garnering interest from new institutional partners and potential program participants, as well as regaining the interest of the media

All of this will be based on our efforts to

- strengthen our relationships with existing institutional grantmakers, while focusing the continued pipeline-building work or our fundraising efforts on content campaigns and topic sponsorships
- reduce complexity in our organization's communication, make our offerings more compelling, and explore new ways of growing our sales

The effort of bringing Wiki Education's impact back on a path of growth requires investments in our organizational capacity. Based on the tremendous dedication of everyone on staff, Wiki Education was able to keep its impact close to where it was before the pandemic hit the United States. Given the reduced capacity in almost all areas of our day-to-day operations, increasing our efficiency has played a big role in making this happen. At the same time, staff has been extremely stretched for the past two years and some people in the organization have taken on additional responsibilities to a level that won't be healthy in the long term. That's why we're going to refill the second Wikipedia Expert position for the Wikipedia Student Program in an effort to not only support more classes, but also to bring relief to the current staff that has gone way beyond what can be expected in their effort of carrying our key program, the Student Program, through the pandemic years.

In order to increase the number of subject-matter experts we bring to Wikipedia and Wikidata while also growing our earned revenue, we will also start a

- two-year capacity-building project aimed at laying the foundation for growing our Scholars & Scientists Program in the long term

As part of that project, we will make investments in market research and marketing communications. We will verify our current assumptions about our customer base and the motivations of first and repeated buyers of our Scholars & Scientists courses. We will also conduct small-scale experiments with different course formats and additional course offerings. Based on this research, experimentation, and the knowledge we have already gained over the past years, we will invest in a new set of marketing materials. Based on our current assumption that our earned income has the greatest potential for scale, these investments will aim at creating the conditions for long-term sustainable growth. Our technology department will support this effort by creating a tool that will make the

enormous impact of our programmatic work more visible and easier to grasp as part of our ongoing effort to increase the attractiveness of our offerings.

Programs

Wikipedia Student Program

Goal: Retain existing faculty and recruit new faculty who teach with Wikipedia as part of our effort to bring our Student Program back on a path of growth

In 2022–23, we will continue our efforts to both retain existing faculty whose students are adding great content to Wikipedia (we had an 85% retention rate among those), as well as ramp up our recruitment of new faculty (currently, 30% of our instructors annually are new to the program). Through efforts like our mentorship program, office hours, and invitations to engage more in our program, we'll work to retain existing faculty. We'll focus our recruiting efforts on our two key content area initiatives: Communicating Science and Knowledge Equity.

Goal: Broaden our footprint at diverse institutions through targeted outreach measures in our ongoing effort of bringing a more diverse group of editors to Wikipedia

As part of our Knowledge Equity initiative, we will add extra emphasis to our recruitment at diverse institutions, including Historically Black Colleges and Universities (HBCUs), Hispanic-Serving Institutions (HSIs), Tribal Colleges and Universities (TCUs), and institutions with large minority enrollments. As a recent academic publication[1] about teaching in our Wikipedia Student Program as a way to implement "meaningful Indigenization" notes, "From the course evaluations, it was clear the Wikipedia experience was rewarding for all of the students, and it was especially meaningful for the students that identify as BIPOC and/or sexual and gender minorities whose voices and perspectives are often missing from mainstream media." In our efforts to promote this open educational practice, we'll focus our attention on recruiting student editors for whom the experience could be even more rewarding. We'll also focus recruiting efforts on faculty who teach in equity-related topic areas at all institutions, including recruiting through relevant academic associations and

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[1]   Nicole VT Lugosi / Nicole Patrie / Kris Cromwell: *Theorizing and implementing meaningful Indigenization: Wikipedia as an opportunity for course-based digital advocacy*, in: Critical Studies in Education 2022

affinity groups (this fiscal year, we supported 146 such courses) . We'll pay special attention to areas where our Knowledge Equity and Communicating Science initiatives intersect, such as improving articles related to the effects of climate change on diverse populations as well as biographies of diverse people in STEM.

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

Thousands of students engage with our Dashboard course pages, our online training materials, and our activities and other instructional materials every year. Keeping in mind common challenges students face, changes to Wikipedia's user interface, and feedback we regularly collect on our materials from students, we'll evaluate our existing materials. We'll refine current content and create new content as needed, including exploring offering additional help videos. In particular, we will ensure our instructions, prompts, and training materials further our efforts to integrate knowledge equity into Wikipedia.

Targets
- 13,500 program participants
- 13,500 Wikipedia articles edited
- 10 million words added to Wikipedia
- Retain 85% of high-quality instructors who teach with Wikipedia
- 10 new instructors from HBCUs, HSIs, and/or TCUs joining our Student Program
- 20 new equity-related courses participating in the Student Program

Scholars & Scientists Program

Goal: Provide high quality experience for participants in Wikipedia and Wikidata courses

In 2022–23, we will continue to ensure participants taking our Wiki Scholars, Wiki Scientists, and Wikidata Institute courses, in which they learn how to edit Wikipedia and Wikidata, will have a high quality experience, both through synchronous Zoom meetings, support in our Slack channels, and individual support for participants over email while they're enrolled in one of our courses.

Targets
- 250 program participants
- 500 Wikipedia articles edited
- 150,000 words added to Wikipedia

- 1,500 Wikidata items edited
- 3,500 Wikidata statements improved
- 96% of participants say courses meet or exceed their expectations

Other Programs

Goal: Develop new angles and fresh variations of our programmatic work as part of an effort to regain grantmakers' and journalists' interest

Over the course of the past couple of years, it has become increasingly difficult to garner attention for our programmatic activities that have been around for more than a decade. Not only has it been hard to get grants officers' attention (some grants officers would rather fund new ideas than provide operational funding), in fiscal year 2021–22 we could also not get much traction on a PR campaign promoting our organization's work. That's why, going forward, we'll invest more time and effort in developing new and exciting angles that help us increase awareness and excitement about Wiki Education's programmatic work.

Technology

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

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. In the coming year, we anticipate some necessary infrastructure adjustments to keep up with the high utilization of Programs & Events Dashboard.

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

Goal: Support Wiki Education Programs and Advancement activities

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 improve how the Dashboard tracks student sandboxes, and to redesign key marketing pages on wikiedu.org. 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
- Improve the user experience for students and instructors interacting with sandboxes

Goal: Provide support for Programs & Events Dashboard stakeholders

This year will be a continuation of our increased level of support for the critical movement infrastructure of Programs & Events Dashboard. We anticipate that Wikimedia Foundation, along with a wide swath of chapters, affiliates, and program organizers, will rely on the Dashboard more heavily in the coming year; in-person editing events will begin ramping up again after largely disappearing during the first years of the pandemic, Wikimedia's forthcoming "Events Center" project for campaign organizing will integrate with the Dashboard and drive up usage, and both analysts within the movement and external researchers are looking for more systematic ways to access rich data about movement organizing that is available within the Dashboard's database. We'll support these needs as they emerge, and continue making progress on the long-term Programs & Events Dashboard roadmap we created last year.

Targets
- Hold Dashboard office hours at least quarterly
- Complete at least one high-priority project from the Programs & Events Dashboard roadmap

Goal: Kick off the creation a platform for visualizing impact on specific topic areas

Wiki Education's participants, funders, and potential funders want to understand the big-picture impact of our work together. The key questions are:

1. What is content like for [MY AREA OF INTEREST]?
2. How has the content about [MY AREA OF INTEREST] changed?
3. How much of that change are we responsible for?

For example, how much Wikipedia and Wikidata content is there about Asian-American journalists? What does its quality distribution look like, and how has it changed? How much have Wiki Education programs contributed to that change?

While the Wikipedia community and the Wikimedia Foundation have developed ways of associating article content with one specific topic taxonomy (WikiProject topic areas), these topic divisions reflect the structure of Wikipedia's editing community. They don't often line up well with the focus area of a participant or funder, and can't easily be used to answer those key questions.

We will build a data pipeline to define and quantify coverage for an arbitrary topic area, and build visualizations to show how much of that coverage came from Wiki Education programs or from a particular campaign. We can use these visualizations to tell the story of how much difference it makes to participate in, or to fund, our programs in a particular topic area.

Targets
- Start building a system that can generate a dataset of all core content (i.e., articles and items) about an arbitrary topic area
- Start building a system that can visualize key metrics about a topic area's content, and visualize Wiki Education's impact on those metrics

Communications

Goal: Support organization's communications needs and overhaul existing materials in an effort to reduce complexity

The blog on our website and our Wikidata newsletter have traditionally been the main outward-facing storytelling tools. Given that we already have a large archive of blog posts that serve our fundraising needs, we will lower the number of weekly blog posts to one per week. Our Wikidata newsletter will continue to be published once a month going forward.

In order to reach a larger audience, we'll encourage participants in our programs to share their experiences on podcasts, collaborate with communications departments at participants' institutions, etc.

Given that Wiki Education operates in a small niche (which, making things worse, is difficult to explain)**,** we'll overhaul our organization's communication, eliminating complexity and elements that may confuse grantmakers and other audiences – on our website and throughout written materials that we distribute in the context of our work.

Targets
- Work with participants in our programs and place at least 10 articles about their experience in their local university newspaper / academic association journal / etc. (baseline for fiscal year 2021–22 is 8)
- Thoroughly review all existing organizational communication materials and reduce complexity

Advancement

Fundraising

Goal: Raise a total of $2,415,000 million for Wiki Education's programmatic initiatives, with a strong focus on institutional grantmakers.

We will continue to dedicate most of our efforts this fiscal year to getting in front of grants officers at institutions that have values and mission alignment with our work and gaining an invitation to submit a letter of inquiry or a grant proposal for a five or six figure gift. While our work falls outside of traditional funding priorities of most institutional

grantmakers, we have had the most success with foundation officers that use Wikipedia regularly and have significant flexibility and influence over an institution's grantmaking. The vast majority of our past fundraising successes was based on grantmakers' desire to educate the general public about a specific topic and the realization that Wikipedia is the most powerful tool to make that happen. That's why, going forward, we will focus on pitching new content campaigns to institutional funders interested in specific topics.

Finding funding that secures the continued operation of a program that's more than a decade old is increasingly difficult. That's why we will start investing time and effort in developing new exciting project ideas to pitch to institutions that complement our existing programs.

We will also tap into the networks of our past and current funders that may be willing to make introductions to like-minded institutions.

Targets
- Raise $2,415,000 million, with a strong focus on institutional grantmakers
- Screen at least 600 new foundation prospects
- Submit at least 20 letters of inquiry or grant proposals

Goal: Add more members to the Advisory Board and foster a deeper sense of community and connection to Wiki Education among members.

Our Advisory Board is aimed at fulfilling a key role: helping us to get into the door with institutional grantmakers. Encouraged by some early successes with this new mechanism, we will focus on growing the number of people on Wiki Education's Advisory Board by tapping existing members and current supporters for recommendations. In order to further spur the Advisory Board members' motivation to actively help us in our fundraising work, we will create more regular communications to engage the Advisory Board. We will work to more deeply explore current members' connections to potential donors. Based on such connections provided by the Advisory Board, we will schedule in-person meetings with select prospects in order to further investigate mutual interests.

Targets
- Add at least 4 qualified new members to the Advisory Board.
- Host a community-building meeting for Advisory Board members in Q1.

- Utilize the Advisory Board to make introductions to at least 15 decision makers at grantmaking institutions as well as high net-worth individuals.
- Introductions are expected to result in at least $75,000 in grants or donations.

Earned Income

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

In 2022–23, we will continue partnering with institutions to provide services for those eager to engage with Wikipedia, Wikidata, and other Wikimedia projects. Through Scholars & Scientists courses, workshops, consultations, and other experimental engagements, we will generate unrestricted revenue for Wiki Education by selling our services. These collaborations will bring high-quality information and subject-matter experts to the Wikimedia projects.

Target
- Partner with like-minded institutions, running at least 22 training courses for subject-matter experts, in order to create at least $220K in earned income.

Goal: Build the pipeline of new and prospective customers, running some small-scale experiments on new ways of engaging individual and institutional customers with our service offerings.

In fiscal year 2022–23, we will focus on growing our customer base for Wiki Education's services. In addition to our existing outreach work, we will experiment with new engagement opportunities for prospective partners.

Since we have an excellent reputation with our existing partners, whom we often retain as ongoing customers, we'll conduct some experiments with expanding the scope of our service offerings to provide engagements with a lower barrier to entry than our current courses. In other words, can we offer services of interest to these institutions that will create a pathway to selling our courses (and ideally, initiate a long-term partnership) once they see the value proposition of Wiki Education's work?

To test this out, we will experiment with offering in-person training workshops (as possible), one-on-one consultations, and other services that we develop in partnership with interested institutions.

Targets
- Experiment with at least two new, low-barrier methods of engagement with prospective partners.

Goal: Kick off a two-year capacity-building project aimed at laying the foundation for long-term growth of our Scholars & Scientists Program

A Bridgespan study published in 2007 dispelled the myth of diversifying across several sources of funding as the best path for nonprofits aiming to substantially grow their revenue.[2] While Bridgespan's research strongly indicated that finding a natural funding source and making it the dominant target of fundraising efforts was the key to substantial growth, only two percent of nonprofits in the study achieved such growth by applying an institutional fundraising approach. At Wiki Education, we've seen evidence that our focus on institutional funders alone might not be the best path to growth either, as we might at some point in the future run out of institutional prospects that are both interested in our work and able to provide the level of operational funding needed.

That's why, in fiscal year 2022–23, we will start a two-year capacity-building project aimed at laying the foundation for long-term growth of our earned income Scholars & Scientists Program. This project will be based on the past success we've had with bringing subject-matter experts to Wikipedia. It is also in line with our assumption that earned revenue can play an important role in our revenue mix, given that – with the exception of fiscal year 2021–22 – we were able to continuously increase the amount of funds generated through course sales.

As part of this new project, we will make investments in market research and marketing communications. We will start with verifying our current assumptions about our customer base and the motivations of first and repeated buyers of our Scholars & Scientists courses. Given that former course participants rave about their positive experiences (indicating that our course offerings are successful), we will also create new marketing materials aimed at creating awareness for our Scholars & Scientists Program.

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[2]   William Foster / Gaile Fine: *How Nonprofits Get Really Big*, in: Stanford Social Innovation Review 2007

Targets

- Conduct market research aimed at verifying our current assumptions about our customer base and the motivations of first and repeated buyers of our Scholars & Scientists courses.
- Create a new set of marketing materials that are suited to increase the number of sales.

Projected Revenue

Our projected revenue, classified by quarter and fundraising component, is detailed in Table 8 below.

Table 8. Projected revenue, by quarter, for fiscal year 2022–23.

	Q1	**Q2**	**Q3**	**Q4**	*TOTAL*
Revenue Total	$1,286K	$518K	$725K	$160K	*$2,689K*
Fundraising	$1,220K	$460K	$650K	$85K	*$2,415K*
Earned income	$66K	$58K	$75K	$75K	*$274K*

Expenses

After we significantly downsized at the beginning of the COVID-19 pandemic in 2020, almost everyone on staff took on additional responsibilities. That means that during the past two years and despite our successes in increasing our effectiveness, the organization has been stretched in a way that would be unhealthy if it continued. At the same time, our long-term goal is to bring our impact back to a path of sustained growth. That's why we'll aim at creating additional capacity in critical areas that will allow our programmatic impact curve point upwards again instead of plateauing.

We'll make targeted investments in four areas: (1) Given that our Wikipedia Student Program creates by far the most content, and this particular area in the organization has been under-staffed for the past two years, we'll refill the second Wikipedia Expert position. This will not only bring relief to the two staff members that have been supporting several

thousands of instructors and students during the pandemic, but also allow us to get the organization in a position for renewed programmatic growth. (2) We'll boost our outreach efforts at diverse institutions by creating a new part-time role aimed at recruiting more instructors at these types of institutions for our Student Program. This means that we'll try to direct the future growth of our Student Program towards educational institutions with a higher percentage of students of color. (3) We'll also invest in Marketing as a way of driving the sales in our Scholars & Scientists Program. This entails both market research and marketing communication and aims at creating a better understanding of where earned revenue growth opportunities are, while also providing better materials for getting potential customers to buy our courses. (4) Finally, we'll spend additional funds on kick-starting a new tech project for visualizing Wiki Education's impact on specific topic areas. We know that both institutional grantmakers as well as our academic association partners are strongly motivated by the "Increase the public's understanding of specific topics through Wikipedia" aspect of our work. Having a tool that creates a compelling visual for how much their investment pays off will enable us to make a stronger case for funding in both our earned revenue as well as in our fundraising work.

In all of this, our overall spending will take the current trends in our external environment into account: given that the COVID-19 pandemic isn't over and that the world economy remains affected by high inflation, ongoing supply-chain issues, and the effects of the war in the Ukraine, we'll take a cautious approach to spending, and adjust monthly expenses if the economic situation worsens.

Table 9. 2022–23 Plan revenue and expenses.

	2022–23 Plan
Revenue	$2,689K
Expenses	$2,417K
General & Administrative	$473K
Programs	$826K
Technology	$441K
Advancement [1]	$677K

Notes:

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

Human Resources

In fiscal year 2022–23, we will create a new part-time role of Equity Outreach Coordinator that will focus on recruiting instructors at diverse institutions into our Student Program, as well as on recruiting faculty who teach in equity-related topic areas at all institutions. In order to strengthen our Programs team for the resulting growth in the number of participants, we will re-fill the full-time position of second Wikipedia Expert. This measure will also bring much needed relief for the small team that's supporting thousands of program participants each year while also enabling us to support more instructors who use "Teaching with Wikipedia" in their classrooms.

With regard to our two-year capacity-building project aimed at laying the foundation for long-term growth of our Scholars & Scientists Program, we will create a new project-based full-time role of Earned Income Team Lead (preliminary title.) So far, our Executive Director has filled in as acting Chief Advancement Officer. Given the needs of this area of work, and also based on the fact that our Executive Director also took on the additional role of acting Chief Financial Officer, this new role will bring much needed relief. At the same time, we realize that a large two-year project needs a dedicated person on staff to make such a project succeed.

Also as part of this new two-year project, we'll hire a full-time data scientist / developer for 12 months and a full-time web developer for 8 months. As we're hiring for very specific needs, we don't expect these roles to continue after the project wraps up in fiscal year 2023–24.

Figure 5. Organizational chart for fiscal year 2022–23
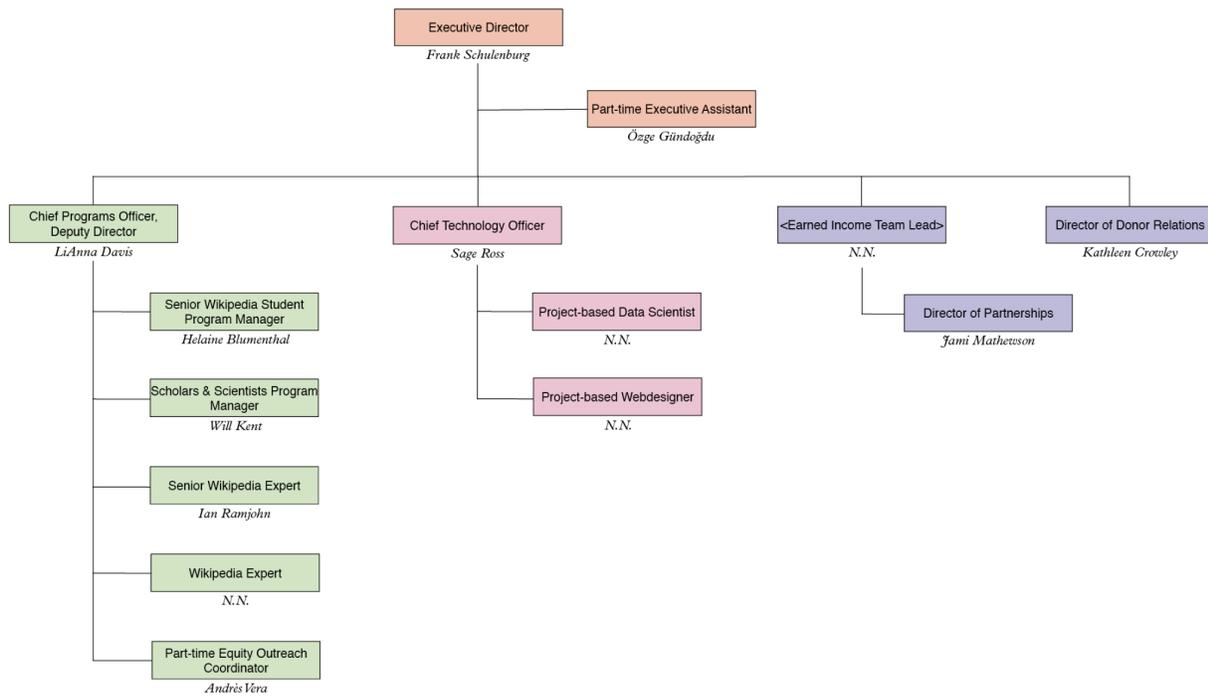
Board Resolution

RESOLVED, that the Board of Trustees hereby approves management's proposed 2022–23 annual plan, which includes $2,689K of revenues, $2,417K of spending. If, during the year, management anticipates the spending at each quarter-end will differ materially from the plan, the Board directs management to consult the Treasurer and the Chair of the Audit Committee promptly. Reference: Management's currently anticipated quarterly breakdown of this approved annual plan.

Table 10. Quarterly breakdown of the Annual Plan financials 2022–23

2021–22 Plan	Q1 (Jul.–Sep.)	Q2 (Oct.–Dec.)	Q3 (Jan.–Mar.)	Q4 (Apr.–Jun.)	Total
Operating Cash [1]	$314K [2]	$1,048K	$957K	$1,092K [4]	
Cash Revenues [3]	$1,286K	$518K	$725K	$160K	$2,689K
Cash Spending	$552K	$609K	$590K	$666K	$2,417K

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 2021–22 as per May 16, 2022.
[3] Anticipated/projected revenue.
[4] Anticipated cash of $586K to be available at the start of fiscal year 2023–24.

Appendix

Risks considered in developing the 2022–23 plan

1. Wiki Education's funding doesn't keep pace with inflation

Over the last several years, Wiki Education has focused our fundraising efforts on acquiring multi-year funding, to provide a more stable stream of revenue. The good news is we've largely succeeded: Many of the grants and donations referenced in this document are multi-year agreements. One challenge of this, however, is the budgeting for multi-year grants typically happens prior to the first year of the grant. Given the current high rates of inflation, our costs in the second and later years of multi-year funding agreements may be significantly higher than originally anticipated. We're closely monitoring the situation, and we will continue to work with our donors to clearly communicate any needs for additional spending to address inflation.

2. Our new hires will have difficulties to fit in and perform on the level expected

Wiki Education is operating in an extremely complex environment at the intersection of Wikipedia, web technology, and the academic world. Furthermore, over the past eight years, our organization has reached a high level of sophistication when it comes to how we plan and execute our programs and how we track results. At the same time, we had a very low staff turnover, meaning that some people in the organization have been working with each other even since the early days of the Wikimedia Foundation (i.e. since 2010, or for more than 13 years), trusting each other and performing well together. All of this means that people joining Wiki Education from outside tend to have a hard time getting up to speed and feeling well integrated: expectations are high and existing long-term work relationships don't always make it easy for new hires to feel right at home. However, we've known this for a while now and we've worked on better integrating new hires. Senior leadership has addressed this issue openly and we'll continue to monitor the situation going forward. We've also figured out ways of making our onboarding more focused in order to get new staff members perform faster.